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ABSTRACT

This guide is designed to be used by union leaders wishing to increase the basic skills (the full array of reading, writing, communication, math, reasoning, and problem-solving skills) of their members by running a workplace learning program. It provides guidelines for analyzing the needs of the target group of workers and for developing an education and training strategy that will meet the members' needs. The guidebook is divided into three parts, six chapters, and four appendices. The four chapters in Part one contains information that will assist the program leader in understanding the basic issues to be dealt with in a workplace learning center, and how this education project can be made part of the union's agenda for explaining larger issues to the members. In part two, two chapters provide nine specific action steps for designing a program of instruction, and other ideas for meeting members' education and training needs. The four appendices of part three provide details of where to find out more about workplace education and training. A subject index is appended. (Contains 86 annotated references.) (KFT)

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A Worker-Centered Learning

A Union Guide to Basic Skills

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Worker-Centered Learning

A UNION GUIDE TO BASIC SKILLS

AFL-CIO Working for America Institute

1999

[A revised edition of Worker-Centered Learning: A Union Guide to Workplace Literacy, published by the AFL-CIO Human Resources Development Institute in 1990.]

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Foreword

The AFL-CIO Working for America Institute is pleased to make available this revised edition of *Worker-Centered Learning: A Union Guide to Workplace Literacy*, first published in 1990 by the AFL-CIO Human Resources Development Institute.

Why did we change the name of our Institute and revise the title of the guide? In short, to reflect the significant changes in education, training, and the economy which have occurred in the last decade and the challenges these changes present to unions today.

The Institute was given a new name by the AFL-CIO in late 1998 to reflect our broader mission. The Working for America Institute is expanding its efforts to build strong communities and economies which increase the availability of quality jobs while we continue HRDI's three decades of experience with job-related training and worker education. Today's unions know that workforce development efforts will achieve the goals of workers, employers, and the larger community only when they're combined with economic development and other strategies.

We revised the title of the second edition to reflect what we've learned about workplace and adult education since 1990. Many educators and trainers from unions, companies, community-based organizations, and a wide range of education institutions praised the first edition (we've included some of their reviews and comments on the back cover of this edition)—but there was disagreement about the word "literacy." This edition continues to focus on literacy, but after much discussion we've chosen to use "basic skills" so that we might reach new audiences for our worker-centered approaches.

Finally, this second edition reaffirms the AFL-CIO's commitment to lifelong education. While some workers may need to meet higher skill demands for their jobs, all workers and their families are in need to learn more about a wide range of issues raised by our increasingly complex democratic society. Everyone should have the opportunity to achieve the educational goal or credential of their own choosing. We believe that only a lack of will—not the lack of a high school diploma or basic skills—should block the road to lifelong and higher education.

Special thanks should go to the authors of the first edition, Tony Sarmiento and Ann Kay, who worked to create this updated and revised edition. Tony has returned to the Institute from the AFL-CIO Education Department, and Ann is now on staff with the AFL-CIO Housing Investment Trust. All of us thank many others (listed in Appendix A) who generously contributed their ideas and skills to advance a worker-centered vision of learning.

BRUCE G. HERMAN
Executive Director
AFL-CIO Working for America Institute

JOHN J. SWEENEY
President
AFL-CIO

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What's New in This Edition

With this second edition of *Worker-Centered Learning*, we have an opportunity to recognize key developments in workplace education that have occurred since the first edition in 1990. Taken together, we believe these developments make basic skills education an even more powerful tool for unions as builders of a strong, skilled union workforce.

First, fresh insights about labor force trends have literally redefined the way many people talk about workforce development—supporting labor's view of the importance of lifelong education. Influential research studies show high skills and high wages to be crucial to a productive, thriving economy. Proponents of workforce development emphasize unions' important contributions to work-based education and training, including negotiated joint programs.

Second, and closely related to the first, are new ways of thinking about the organization of work. While many employers have been slow to embrace this, we see growing recognition of the important contributions workers make to quality and productivity when the work system lets them exercise both "thinking" and "doing" skills. Some unions are bargaining with employers to create more democratic work systems where their members participate in decisions and share in the rewards of their labor. A solid foundation in basic skills is widely seen as essential for workers in these new work organizations.

Third, we know more now about the extent of workers' educational needs. The National Adult Literacy Survey gave us our first comprehensive look at adults' basic skills, including the needs of immigrants in our diverse society. While it showed that relatively few of us are truly "illiterate," it did show that at least half of adults could benefit from education to strengthen basic reading and writing skills. Meanwhile, innovations in assessment are creating ways to measure literacy proficiencies that are more meaningful than "grade levels."

Fourth, changing information technologies continue to expand unions' options for building their educational capacity. Unions have gained experience in using learning technologies to teach basic skills as well as to link learners at distant sites.

Finally, we are pleased to observe that unions' worker-centered learning strategy has attracted growing recognition from educators. Labor-sponsored educational programs have earned national awards, and experts repeatedly point to them as models to emulate. Unions need to share that message with employers, who are still not investing enough in worker skills, and with the state and local agencies that have responsibility for public adult education and training programs.

In revising the title for this second edition, we mean to emphasize that unions' interests in "basic skills" education are much broader than the traditional meaning of "literacy." The examples you will see in these pages show that unions are using basic skills education in its broadest sense to achieve their vision of good jobs and a better quality of life for working families.

Why You Should Read This Guide

Unions are some of the best experts on workplace education. Few organizations can match their track record for helping workers improve their basic skills. Unions' experience—brought to you in this guide—can help you establish or strengthen a workplace learning program for your members.

A local union president learns about a new law requiring workers in certain occupations to pass a certification test in order to keep their jobs . . .

A state AFL-CIO president, serving on the governor's workforce development board, is told an "epidemic" of worker illiteracy threatens the state's competitiveness . . .

A central labor council is asked to endorse the community college's proposal for a workplace literacy program for former welfare recipients . . .

A union officer receives a review copy of the state's proposed workforce development program . . .

A shop steward observes that some members aren't using the job safety manuals that came with new equipment . . .

The Purpose of This Guide

Are these scenarios familiar? As a union leader, you almost certainly recognize them. Like others throughout the labor movement, you regularly face situations that demand action on basic workplace skills—the skills we often call workplace literacy.

You have probably heard it argued that basic skills are the foundation for a high performing workforce, and that prosperity in a global economy will increasingly depend on the literacy skills of our nation's workers. Unions, strong advocates of education, have long understood the value of their members' skills.

As a union leader, you also know that being literate is more than simply knowing the ABCs. A literate citizen is one who commands the reading, writing, figuring, and reasoning skills needed to meet personal life goals and participate fully in a democratic society. This makes adult literacy a true union issue.

This guide is for you—the trade union leader who recognizes that worker education is one of the labor movement's real bread-and-butter issues. We at the AFL-CIO Working for America Institute hope you will use the guide to make workplace learning part of your union's agenda.

What This Guide Will Give You

In these pages, we give you guidelines for analyzing your own situation and for developing an education and training strategy that will help meet your members' needs.

We warn you about potential hazards that stem from poorly designed and executed programs so that you can avoid harm to your members and your union.

In addition, we give you examples of how and why unions have been involved in education and training programs for decades. We want to demonstrate why workplace learning isn't a new issue at all, but one that organized labor has long embraced as a way of serving union members, strengthening the union movement, and meeting the needs of their employers as well.

Getting your union involved in workplace learning may not be as hard as you think. The climate today—among educators, federal and state government, employers, and community groups—is supportive of basic skills initiatives. And as the representative of the learners who would be served, your union is the best organization to shape the programs created for your members—whether they be education or training programs, or some combination. With the right resources and leadership, your union could choose to operate a program. But at the very least, the union needs to find a way to participate in the governance of education programs serving your members. This guide will help you identify the key considerations in determining your role.

What This Guide WON'T Do

Don't expect to find a quick fix in this guide, a one-size-fits-all solution to workers' educational needs. There's no such thing.

Also, don't look here for the ideal program for your members. You can't get that from national experts or by copying what's worked for others. It would be like trying to copy someone else's collective bargaining agreement.

Just as the best contract takes into account what has worked elsewhere, it must also be tailored to fit the specific and constantly changing needs of your members and the employer. The same is true of education and training programs.

This guide has its limitations. Although we've tried to make it broadly useful, the labor movement is so diverse and its members' needs are so varied that we couldn't give all of those needs the attention they deserve. For example, we don't deal with the specialized needs of our members who have what are often described as learning disabilities, or with the education needs of our members' children who are in school or have dropped out.

What We Mean by 'Basic Skills'

When we refer to *basic skills*, we are talking about much more than knowing how to read, add, and subtract. The term also covers much more than the narrow skills for a specific job. We consider *basic skills* to include the *full array of reading, writing, communication, math, reasoning, and problem-solving skills* that enable an individual to "function in society, to achieve one's goals, and to develop one's knowledge and potential." The

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words in quotes are the goals of literacy as defined in the largest U.S. study of adult literacy.

Workers who lack those basic skills are not necessarily illiterate. They may even perform at a high level of technical skill in their jobs. But they lack the breadth of skills to function at their full potential in today's complex world.

Workplace basic skills programs, at their best, reflect the efforts of labor and management to address the literacy needs of workers in the broadest sense—their basic academic skills, their job-related skills, and their life skills. Developing a learning program that reconciles the learning goals of workers and their employer is a process in which union representatives play a critical part. That negotiating process will build on the structured dialogue between employer and union that is established in collective bargaining and other labor-management forums.

How To Read This Guide

We recommend reading the guide in sequence from beginning to end. It moves you from the big picture to the specific—from the context for unions' involvement in basic skills education (Part I), to the "how-to's" of a successful program (Part II), and finally to resources that can broaden your knowledge and networks (Part III).

If you do skip around in the book, you'll find cross references to other chapters that relate to what you're reading. The detailed "Contents" up front and the "Index of Labor Organizations" at the end will help you track down topics you want to find. We hope you will also look through all the chapters to make sure you don't miss anything that would interest you.

What You'll Find in Each Section

Part I— "Understanding Workplace Basic Skills"

Chapters 1 through 4 contain information that will help you understand the issues—so you can make workplace education part of your union's agenda and can explain the issues to your members.

Part II— "Designing a Worker-Centered Program"

Chapters 5 and 6 give you nine specific action steps for designing your own program, plus other ideas for meeting your members' education and training needs.

Part III—"Getting More Information"

Appendices A, B, C, and D tell you where to find out more about workplace education and training.

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For Further Information

Working for America or your international union can give you further information about basic skills issues and can put you in touch with other experienced labor organizations that have operated workplace learning programs. If you're interested, call the Working for America national office:

AFL-CIO Working for America Institute
815 16th Street, N.W.
Washington, D.C. 20006
Phone: (202) 638-3912 or (800) 842-4734
Fax: (202) 783-6536
e-mail: info@workingforamerica.org

The rest is up to you. You wouldn't let someone outside your union negotiate your contract. Why let someone else negotiate and plan your members' education and training? There's too much at stake not to get involved. Besides, don't your members expect you to look after their education and training interests? No one is in a better position to do so than your union.

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PART I

Understanding Workplace Basic Skills

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1. Agenda for a Changing Workplace 3
2. Unions' Stake in Workplace Education 9
3. Basic Skills in Today's Workplace 15
4. A Worker-Centered Learning Strategy 25

1 Agenda for a Changing Workplace

In today's workplaces, change is often unexpected, unavoidable, and threatening. Planning for change is one way unions can help control its impact on their members. To carry out their agenda for a changing workplace, many unions look to their established labor-management relationships. Through collective bargaining, unions have often been able to plan for change and reduce or eliminate its harmful effects. An education and training strategy that includes basic skills is frequently an important part of that agenda for change.

Unions Respond to Change in the Workplace

Finding solutions to changing workplace needs has always been a priority for the American labor movement. In a constantly changing work environment, unions have sought from their earliest days to harness the benefits of change for their members. Over the years, unions led their members through the transition from an economy based on small craft shops to the complex industrial base of the twentieth century. They saw to it that their members got the education and training they needed for changing jobs, and they exercised the leadership of this highly skilled workforce to improve living standards and working conditions.

Today, change exerts new pressures on working people. Global markets and innovative technologies are reshaping many jobs and the skills needed to perform them. New work systems may call on workers to exercise a wider range of skills and judgments. Unions continually need to reassess how to represent workers' interests in this changing work environment. They need to challenge demands for concessions and attempts to undermine union representation. They need innovative strategies to help members contribute to and share in improved productivity. As always, education and training can help achieve unions' vision of good jobs, decent wages, and a better quality of life for workers and their families.

The collective bargaining relationships that unions have established with their employers enable workers and employers to come together to discuss these changing education and training needs. The joint problem-solving mechanism of collective bargaining gives unions a voice in addressing workplace concerns. Unions that bargain over the actual decisions to change, not

Bargaining over Education and Training

An employer subject to the duty to bargain must negotiate over mandatory subjects of bargaining. These include wages, hours of work, and a variety of other terms and conditions of employment. When you are considering an education program for your members, keep in mind that employers generally have a duty to bargain over the following (among other things):

- education benefits
- job-related skill training
- testing of skills and aptitudes
- the *impact* of a decision to make operational changes—which could, of course, include impacts on skill requirements, work organization, work processes and technology, pay and promotion opportunities, etc. (and in some situations, the decision itself is subject to bargaining)

just the impact of those decisions, are bringing their union agenda to the reshaping of the workplace. The expression of workers' views at the bargaining table—through their union—supports the principle of democracy in the workplace.

Our Broad Strategy for Change Is Threefold

Any planning for change in the workplace needs to recognize at least three factors that affect how work gets done in any industry.

1. **work processes**—the way work is structured and jobs are designed to support the accomplishment of desired tasks
2. **technology**—the tools, materials, and systems that are made available to help accomplish work; the physical environment of the job
3. **worker skills**—the education or training that will enable workers to perform their jobs effectively

Change in any one of these interconnected factors has an impact on the others. Take new technology as an example. A strategy for introducing high-tech tools can't ignore either work processes or worker skills. The strategy should seek to adapt the work situation to workers' needs—not to conform the workers to the new tools. For instance, is the new equipment designed so workers can perform their jobs comfortably, safely, and effectively? Will job responsibilities, and therefore job classifications, need to be redrawn? Will workers have access to training so they can make the most effective use of the new equipment?

The foundation for performing any job is good basic skills. Your union's support of workplace basic skills

education can help your members prepare for changes in their jobs. In this way, workplace education supports your broader strategy for change in the workplace. That's why basic skills education is a key item on our larger agenda for workplace change.

Preparing for Change Is a Joint Concern

Employers and unions each have vital interests that bring them to the bargaining table to plan for change in the workplace. Employers want a productive, profitable operation—or, in the public and nonprofit sectors, a productive and cost-effective one. Unions want to ensure the broadest opportunities for workers. Ideally, both goals can be met when both sides negotiate a vision of the future and prepare for it together.

Unions can help assure that employers take the "high road" to change. How can goals for the future be achieved without

Negotiated Responses to Change

Unions have devised creative solutions jointly with management to address members' needs as part of any plan for change in the workplace.

- **work organization**—A joint process for implementing new work systems can be established through collective bargaining. Contract language can provide for a jointly developed strategic business plan, shared technical and financial information, and joint decision-making that taps the expertise of union members on work processes, technology, and training. Unions in many industries are pursuing the "high road" to increased competitiveness through work systems that make work more secure, safe, and rewarding.

- **new technology**—Under some collective bargaining agreements, unions bargain over new technology and have a negotiated process for determining jointly *what* new technology will be adopted and *how* it will be used. Advance notice of new equipment or technology is required under many union contracts. In some workplaces, joint labor-management committees have the responsibility of deciding whether new technology is needed and how to implement it. Unions that have not been able to include provisions like these in their agreements can only negotiate over the *impact* of new technology on members' jobs.

- **job content**—A number of unions have established the right to negotiate not only new job classifications but also the qualifications required for those jobs. When unions take the lead on these issues, job content can be determined on the basis of their members' first-hand knowledge of the workplace.

- **advancement opportunity**—As work processes change, some unions have established new lines of promotion for their members. These career ladders open new avenues for advancement with existing employers. Equally important is the posting of job openings so members are fully informed of advancement opportunities.

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undermining workers' job security, wages, and living standards? What changes in workers' jobs and work processes will better draw on their knowledge and skills? What new equipment would help workers institute new services or product lines? What kinds of training do workers need to update and expand their skills?

To bring their strategic plans to life, employers need to enlist the help of workers, through their unions. That's simply good management. An employer who's serious about planning for change should share its long-term goals with the union. When the union has early access to this information, workers can contribute to the planning process and bring about change that benefits both sides. The value of worker involvement in planning has been shown in a variety of studies, many of which are described in Appendix C, "Useful Reading."

For your union, an agenda for change can directly support your fundamental mission to provide your members with better jobs, more secure jobs, and a stronger union. Unions are using the forum of labor-management relations to protect members' employment rights and security in the face of a changing work environment. These protections extend across all three aspects of work—the content of workers' jobs, the

Basic Skills and Workplace Democracy

Shared decision-making is the basis for workplace democracy. Participation with management in developing a workplace education program can be a step toward shared problem-solving on other important issues:

- ☐ **business strategies and policy decisions**
- ☐ **resource commitments**
- ☐ **quality standards**
- ☐ **work systems**
- ☐ **technology in the workplace**
- ☐ **promotion opportunities**
- ☐ **broader education and training policies and programs**

As an example, the United Auto Workers and General Motors negotiated shared decision-making on training, providing the union a joint role with GM in all phases of training provided at the company for UAW members. This includes union participation in decisions relating to new equipment or work systems. Before GM signs off on the specifications for new equipment or manufacturing systems, the union gets to provide its input on the development and delivery of training to implement it.

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workplace technology, and the skills workers bring to their jobs.

In the chapters that follow, we'll focus on how unions address the critical issue of their members' skills. American labor unions have always had education and training on their broad agenda. From the days of the early craft guilds, when one generation of workers trained the next, unions have understood that maintaining a highly trained workforce is a source of labor's strength. Today labor unions are exploring new avenues for education and training, in keeping with the changes in our worksites.

This Agenda Needs Support from Public Policy

Our labor-management initiatives alone won't provide the relief our members seek in a changing work environment. These efforts can be successful only when public policies support the needs of America's workers in a changing economy. This includes government policies on trade, taxation, job creation, and capital investment, including investment in "human capital." Also essential are policies that ensure workers an independent voice in more of the decisions about workplace change (see the box on "Basic Skills and Workplace Democracy").

Developing our nation's human resources requires a strong public commitment to education and training. Privately funded programs in the workplace can't replace the publicly funded education and training systems. The two must go hand in hand.

So, while labor's strategy for workplace change will naturally draw on the labor-management mechanisms we describe here, unions have a continuing role to play as advocates of effective public investments as well.

2 Unions' Stake in Workplace Education

A union-sponsored education or training program can be an important ingredient in your union's quest for economic justice and a better life for working families. It can be one of the most valued services you offer your members. Because your union represents the interests of the learners (your members), your union is the natural organization to sponsor a workplace-based education program. Watch out for poorly designed programs, though; your members and the union can lose more than they gain.

Worker Education Promotes Our Broader Objectives

Education and training—including basic skills programs—are key ingredients in your union's broad strategy for helping your members deal with changes in the workplace. What's equally true is that education and training help you serve your members and strengthen your union.

A union-sponsored education or training program that includes basic skills can help you achieve many of labor's key workplace objectives:

1. **protecting your members' employment security**

   For example: The Philadelphia Hospital and Health Care Workers union (District 1199C, American Federation of State, County and Municipal Employees) tracks employers' changing skill requirements through the hiring hall it established and then helps members obtain needed education and skill certification through its learning center. The Union of Needletrades, Industrial, and Technical Employees (UNITE) in New York used a union-run English language class to educate members about proposed team work systems and to get workers' input on workplace changes. When a new law required commercial drivers to pass a national licensing test to keep their jobs, the Amalgamated Transit Union and the International Brotherhood of Teamsters helped their members improve their technical knowledge, basic reading, and test-taking skills.

2. **increasing your members' job advancement opportunities with their employer**

   The Bakery Workers (at Nabisco), Machinists (at Boeing), and Service Employees (at Cape Cod Hospital) are among the many unions that have negotiated career paths in new high

performance work systems, so members can take advantage of job restructuring and related training to advance in their careers.

3. **advancing the workplace safety and health of your members**

Through its asbestos abatement and hazardous waste removal training program, the Laborers' Union has enabled members to qualify for new jobs, while protecting the health of its members and the public.

4. **expanding opportunities for quality education**

The American Federation of Teachers, together with the AFL-CIO and other affiliates, works tirelessly to establish high standards for the academic and occupational education offered at the primary, secondary, and postsecondary levels.

5. **reaching out to new members**

Education and career advancement were key issues for District Council 37, American Federation of State, County and Municipal Employees (AFSCME) when the union organized New York City hospital workers in the late 1960s. The result was the large educational program that continues today as a significant benefit for New York City workers represented by AFSCME. Citizenship and English language courses attract recent immigrants to the El Paso Central Labor Union's Rio Grande Workers Alliance. Unrepresented workers who attend Alliance programs can become AFL-CIO associate members and learn the value of being connected with a union organization.

What the union is doing is great. It's giving every employee the opportunity of bettering themselves.

—Teacher's aide enrolled in a union-sponsored college degree program

I would never in a million years have gone back to school. . . . I owe it all to the union.

—Sewage treatment worker enrolled in a GED program sponsored by his union

Friends who work in other industries can't believe I have this benefit!

—Industrial worker taking a union-negotiated personal development course

6. **serving members' diverse educational needs**

Steelworkers in the basic steel industry can pursue personal interests or prepare for a future post-retirement career through the joint educational program negotiated by their union. The children of union members got their own classes as part of the wide-ranging joint program that the United

Auto Workers have developed with DaimlerChrysler in Delaware and elsewhere.

Unions Should Sponsor These Programs

Certainly basic skills programs, as part of a broader education and training effort, can help you further your union's objectives in the ways we've just described. But those programs need to carry your union's imprint. We believe unions should sponsor those programs themselves. Unions are the most appropriate organizations to run learning programs for their members. (See the box, "Why Unions Should Provide Education and Training Themselves," below.)

Even when the program has employer involvement and support, the union is still the best choice to sponsor the program. The union is the one

Why Unions Should Provide Education and Training Themselves

- Workers go to their union when they need help. Naturally, they look to you—their union representative—for advice and assistance on job training and career advancement matters.
- Your members know the union represents their interests unconditionally. That representation is guaranteed by the contract and by law. At the same time, they also know that their employer will always be evaluating them for their job performance and productivity. Your members will be more comfortable in an education or training program that's not identified with their supervisors.
- Workers want their employer to judge them solely by their work performance. Having an education program sponsored only by the employer can confuse that evaluation process.
- You know your members and communicate well with them. Your members know they can talk freely with their union about their educational needs and shortcomings.
- You know their jobs and understand the changes that occur in their worksites.
- You know how to involve learners—your members—in designing the kinds of programs they want and need.
- You can ensure that the education program is supportive of the union's broader priorities—that it enhances job security, advancement opportunity, workplace safety, outreach to new members, and other objectives.
- Your members will be reluctant to participate in a program without their union's endorsement. They trust your judgment.

organization that represents the potential learners, and it's uniquely positioned to look after their interests. It is led by people elected by the workers themselves. That's why many of the most successful programs are operated by unions on behalf of their members—even programs that receive financial support from employers. Those employers recognize that the union can make the program succeed.

As the sponsor of a program, you have a variety of options as to what your union's role will be. As you'll see in this guide, your options can include hiring your own teachers and operating the program yourself, entering into agreements with local schools or community groups, or participating in a joint labor-management education program where the union is the equal partner of the employer. You'll have to decide which approach is most appropriate for your situation. But no matter which approach you choose, the union needs to be in a position to plan and oversee the program from start to finish.

Education Isn't Just About Schools

Why is education an issue for the workplace? Why not just improve our schools?

Schools can't handle the vast needs of workers in a changing workplace. First, most of the working people who could benefit from new skills are long out of school. They may have been in the workforce for years, and it's there that they'll confront their need for further education and training throughout their working lives. Unions and employers have a responsibility to reach out and serve adults who are no longer in school.

This doesn't mean that classes must be job-related or that they must be held at work. What it does mean is that the workplace is an ideal place to reach adults who want to continue to add to their skills and knowledge. Unions (and employers) are in a good position to do that.

Second, our existing adult education system isn't prepared to respond to the changing skill needs in the workplace. Adult education is seriously underfunded. As we'll see in Chapter 3, "Basic Skills in Today's Workplace," adult education programs have the resources to serve only a tiny fraction of the adults who need basic skills assistance. Most adult education courses are oriented to the traditional high school curriculum or to preparation for a high school equivalency degree. The content may not seem relevant to the lives of working adults. Moreover, many of the workers in search of new skills already have their high school degrees. It's no wonder then that the dropout rate from the traditional adult education programs is extremely high. Workers too often don't find what they're looking for. With some exceptions, these programs tend to have little connection to the knowledge and skills that workers seek.

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Similarly, volunteer-based literacy programs aren't generally equipped to help workers adapt to changing workplace requirements. Visibility in the media has raised expectations about what the volunteer movement can accomplish, and these programs are striving hard to keep pace with that need. Unfortunately, though, they are often hampered by a lack of resources and are likely to be inexperienced with education and training for the workplace.

Programs based in the workplace have another advantage: learners who share similar job experiences support one another. Working together on the job can reinforce learning together in a class. It's also a living model for collective problem-solving.

Workplace Education Initiatives Are Timely

Widespread public interest in keeping our nation's workforce competitive gives a special timeliness to unions' initiatives in basic skills education. So does the public interest in adult literacy. Many of our federal and state leaders have helped raise a nonpartisan awareness that adults need a chance to continually update their knowledge and skills. There's a growing understanding that education and training programs based in the workplace can help people keep in step with a changing economy and society.

But employers for the most part have been unwilling to take a leadership role in expanding workers' opportunities for education and training. They simply aren't making the necessary investments in worker skills—committing to training only when it's short, cheap, and unavoidable. The initiative in establishing or expanding these programs must often be assumed by the union if workers' skills are to be kept current.

The national interest in workforce education puts unions in a stronger position to leverage employer support for new or broader programs. There is a growing public expectation that employers have a responsibility for keeping workers' skills up to date. The expectation has been reinforced by a number of high profile commissions and study groups, all advocating greater employer investments in training. Even some prominent employer associations agree. In this climate, employers are likely to be more receptive to education and training initiatives from unions.

Education Is No Cure-All, Though

Like some employee assistance programs that appear to be well-intentioned, education and training programs—and especially basic skills programs—can be the vehicle for policies that run contrary to the interests of workers and their unions. In the area of health and safety, unions have found that training has political as well as technical content; the same is true for basic skills. As a union leader, you'll want to be careful in selecting and

recommending the specific approaches that will be used. If the employer attempts to establish a program that doesn't meet your members' needs, why would you give the union's endorsement? Your members want you to look after their interests.

Similarly, guard against unrealistic expectations. Basic skills education is often promoted as a solution to all kinds of workplace problems, from safety to productivity. But even with the best job safety training, for example, injury rates won't go down if the employer refuses to correct obvious OSHA violations. Workplace education needs to be part of a broader plan that addresses all of the interconnected workplace needs together. Leaving some major needs unmet will only undermine the learning program.

When to "Just Say No"

Workplace literacy programs can be abused. A badly designed program can harm your members and your union. If an employer advocates a program that doesn't meet your members' needs, just say no!

- ☐ **Don't** sign on to a program if you're not a full partner in it. A lesser role for the union means you can't be sure your members' legitimate interests are protected.
- ☐ **Don't** endorse approaches before you've examined their potential impact on your members. You might unknowingly recommend activities that damage their employment rights and opportunities, their self-respect, or their dignity.
- ☐ **Don't** let the content and goals of the program be imposed by others. Most adults reject programs that only teach what someone else says is "good for them." Instead, adults choose programs where they can learn what they themselves wish to learn.

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3 Basic Skills in Today's Workplace

We need to clear up some common misconceptions about workers' skills. To function in changing jobs and in the complex modern world, adults need to be proficient in a wide range of basic skills. As a result, today's definition of what it means to be "literate" is far broader than it used to be. Those basic skills may be even more critical for jobs of the future, but some prevalent views about work and learning need to change. Working people need more opportunities to keep their skills up to date and to participate in planning for changing skill requirements.

Reports on Skills Can Be Misleading

Workforce skills have become a national concern. Certainly this is not a new issue, but the impact of change in our global economy has spurred a broad nonpartisan interest in the basic skill levels of adult workers. From business organizations and government leaders, from educators and the media, we hear how workers' basic skills are crucial for maintaining our nation's economic competitiveness. Sometimes we also hear workers and their skills being blamed for economic problems.

The issue of workforce skills certainly deserves our serious attention. For workers as individuals, a good grounding in basic skills might make the difference in qualifying for a higher-paying job, helping their children with homework, and participating fully in community activities. For workers as citizens and union members, basic skills help maintain a robust economy, a strong labor movement, and a sound democracy.

But the issue of workforce skills—especially basic literacy skills—tends to be misrepresented in the popular media. News stories often describe the lack of literacy skills among America's workers, giving the impression that a shockingly large percentage of the workforce can't read the simplest sentences or do the easiest math. Even more disturbing, we are told that this apparent "epidemic of illiteracy" among workers may be growing, imperiling our nation's competitiveness—despite billions of dollars reportedly spent by employers to end the problem.

As this chapter describes, the best research on literacy reveals a different picture from what we may have seen in the media: the vast majority of American workers *do* know how to read, write,

and compute. And they are also aware when their skills are inadequate or becoming obsolete. Most workers are already convinced that upgrading skills is vital to their own future and the future of their families.

We are missing the point when we focus the blame for literacy problems on working people. Instead, we should look more closely at what employers and public policy-makers are doing. Do they make available the training and education that today's workers want and need?

The answer in most cases is no. Employers remain largely unwilling to commit the resources required to keep up the skills of the workforce. Contrary to popular impressions, they offer training to just a small percentage of workers. And when working people seek to improve their basic skills through the publicly funded adult education system, they find a limited range of programs already straining to meet demands.

Defining Literacy Is Not Easy

To appreciate the significance of basic skills in the workplace, we need to understand what "literacy" really means. Unfortunately, there's no simple way to define literacy. Moreover, its meaning keeps changing. Literacy and literacy standards depend on what skills our society considers necessary or important.

In the United States of 100 years ago, for example, you were considered literate if you could simply sign your name. By that standard, nearly everyone in the U.S. today is literate, as educational experts generally agree. As work and society grew more complex, literacy standards were also raised—for example, to require reading skills at the fifth, or eighth, or twelfth grade level.

What Literacy Isn't

Misuse of the terms "literacy" and "illiteracy" causes a lot of confusion. Here are some of the things literacy is *not*:

- **Literacy isn't an "all or nothing" condition.** Being literate involves many different skills. Individuals can be strong in some of those skills even when they're weak in others. And an individual may perform the same skill at different levels, depending on the specific situation and prior knowledge about the subject.
- **Literacy isn't the same as intelligence,** and it is not fixed early in life. Through educational programs, individuals can improve their literacy skills, regardless of age.
- **Literacy isn't the same as grade level.** It's misleading to peg adult literacy to achievement test scores. Paper-and-pencil tests often don't measure the skills adults actually use to function in their jobs and in society.

Defining adult literacy is complicated further because many education experts believe that it's no longer useful to set literacy standards based on grade or reading levels. These experts argue that any single measure or score is too simple. Literacy encompasses too many kinds of skills used in too many different types of situations.

For example, most people recognize that reading, writing, and math represent different skills. But do we also realize that there are different types of reading? The type of reading depends on a number of factors, such as how the printed information is organized (paragraphs, lists, tables) or how it is to be used (to locate a specific piece of information, find a solution to a problem, read for pleasure or general knowledge). A person may find reading easy or difficult, depending on the type of reading involved.

Single literacy measures like grade-level scores also don't take into account a person's background knowledge. For example, a mechanic may score at a high grade-level when reading technical materials that he or she uses regularly. The same person may have difficulty with "simpler" reading on an unfamiliar subject.

Today, Literacy Involves Many Skills

In keeping with the latest educational research, the National Adult Literacy Survey (NALS) adopted this definition of literacy:

> **literacy**—using printed and written information to function in society, to achieve one's goals, and to develop one's knowledge and potential.

This is a new way of understanding literacy. NALS, a research project established by Congress, found it useful to recognize three distinct areas of literacy knowledge and skills:

> **prose literacy**—understanding and using information from texts, such as newspapers, magazines, and books
>
> **document literacy**—locating and using information from documents, such as job application forms, bus schedules, maps, tables, and indexes
>
> **quantitative literacy**—applying numerical operations to information contained in printed materials, such as checkbooks, menus, order forms, and advertisements

NALS is not alone in supporting a broad definition of literacy that encompasses different groups of skills. The International Adult Literacy Study adopted the same definition as NALS.

As useful as it is, we believe the NALS definition of literacy describes only part of the spectrum of basic skills that are essential for working people in today's world. A variety of interpersonal and organizational skills are also basic for achieving one's goals at work or in the community.

One way of looking at that broader spectrum of essential basic skills was devised by the American Society for Training and Development (ASTD), which listed seven basic workplace skills:

foundation—knowing how to learn

competence—reading, writing, and computation

communication—listening and oral communication

adaptability—creative thinking and problem-solving

personal management—self-esteem, goal setting, motivation, and personal and career development

group effectiveness—interpersonal skills, negotiation, and teamwork

influence—organizational effectiveness and leadership

Similarly, the business, labor, education, and government leaders who served on the Department of Labor's SCANS Commission defined eight categories of skills needed in a high skill, high wage economy. SCANS (short for Secretary's Commission on Achieving Necessary Skills) divided these into competencies and foundation skills:

competencies—ability to make productive use of (1) resources, (2) interpersonal skills, (3) information, (4) systems, and (5) technology

foundation skills—including (1) basic skills, (2) thinking skills, and (3) personal qualities

Unions understand that to apply these basic skills and competencies, working people also must know how to participate effectively in the power structures that determine how things get done in our communities and workplaces. This includes knowing how to use collective action to help equalize unequal relationships. Workers can't hope to take a meaningful role in workplace problem-solving, for example, if they can't exercise power in the structure of the workplace. Unions help them do that. Today's broader definition of literacy therefore must also encompass:

empowerment—understanding and participating in the systems that affect people's lives and jobs

What is the relationship among these basic skills? How is one skill connected to the others? Experts disagree. Someone who struggles with reading, writing, and computation won't necessarily have trouble with problem-solving or interpersonal skills; or vice-versa. For example, a worker may be able to speak clearly, thoughtfully, and persuasively after analyzing a job-related problem—even to large audiences. But that same person may find it extremely difficult to express the identical ideas in writing.

What Measures Make Sense?

If we embrace a broad definition of basic skills like those we've just discussed, we

can begin to see how difficult it is to measure the literacy levels of individual workers. Using a single standard or measure to summarize a person's literacy skills is not very meaningful.

In its landmark analysis of adult literacy levels, NALS considered at least three measures to be necessary, one for each of its three types of literacy: prose, document, and quantitative literacy. NALS avoided, however, setting a minimum score to separate the "literate" from the "illiterate."

Even using a term like "functionally illiterate" is not very helpful. The ability to use one's literacy skills to perform or function depends on the *context* in which those skills are used.

For instance, if a worker has no difficulty reading manuals on the job, but does have trouble writing reports to a supervisor, should that person be considered "functionally" literate or illiterate? What if that same adult who has writing problems on the job is nevertheless able to convey family news in letters to friends and relatives? Can we call that person functionally illiterate in writing skills?

The answer depends on several factors, including what the situation requires, who is determining the acceptable level of performance, and how performance is being evaluated. This is what education researchers mean by establishing a "contextual" definition of literacy.

How Widespread Are Literacy Needs?

If it is difficult to classify an individual as literate or illiterate, then how can we generalize about the literacy skills of a specific group of workers—or of all the adults in the United States? Only with great caution and strict conditions.

Researchers have a hard time agreeing on the number of adults with literacy deficiencies in this country. Their estimates range from 4 million to 90 million. Like estimates of the number of unemployed or poor people in the nation, the number of low literacy adults depends on what definitions or standards are used.

The most comprehensive study of adult literacy levels in this country was the NALS national household survey done in 1992. It showed that about 90 million people, or nearly half of all adults, have low or very low proficiency on the three literacy scales. But many experts concur that it's only about 4 million adults who truly don't recognize or understand letters and numbers. The adults portrayed in the media who can barely sign their names represent a tiny minority of those who could benefit from improved literacy skills.

The English language needs of immigrants add another dimension to the literacy picture. NALS found that among the 90 million adults who are having the most difficulty with English literacy skills, some 14 million are foreign-born. Many of those are likely to need help reading and writing English,

although they may be proficient in their native language.

Our nation's needs are further multiplied when we add all other adult Americans—from high school dropouts to college graduates—who must maintain or add to their basic skills in order to meet the changing skill requirements of their jobs, families, and society. Their educational needs merit greater national attention and resources. That includes more research on what teaching techniques work best for adult learners, as education experts like Judith Alamprese have pointed out.

> ***The organized labor movement realizes that education is not an arbitrary thing that automatically ends with a certain year of life, but that it must continue throughout life if the individual is really to live and make progress. . . . [Unions] realize that education is an attitude toward life—an ability to see and understand problems and to utilize information and forces for the best solution of [life's] problems.***
>
> —Samuel Gompers, First President
> American Federation of Labor
> Address to Teachers, 1916

Many workers and their unions are convinced that Samuel Gompers' observation (see box above) is just as true today as it was more than three quarters of a century ago. To attain their individual goals and to realize organized labor's vision of a better workplace and society, workers are still trying to find ways to improve their skills continuously—both their broad basic skills and their specialized technical skills as well. But to meet these education and training needs, more programs will be needed—at more workplaces as well as in more communities.

Aiming for High Skill, High Wage Jobs

The competencies described in the broad definitions of basic skills are critical for workers who want the high paying jobs that many people consider key to a strong economic future and rising standard of living. In its influential report, *America's Choice: High Skills or Low Wages!*, the Commission on the Skills of the American Workforce pictured the U.S. at a fork in the road. One way lies an economy based on high paying jobs; the other way, an economy based on marginal employment. The high wage path is often achieved through new work systems, worker education, and high wages for high skills, according to the Commission, which was co-chaired by former Labor Secretary Ray Marshall and had several labor leaders as members. At present, though, the U.S. economy appears headed down the low wage path, as the Economic Policy Institute has documented in its *State of Working America* reports. Too much of the

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employment growth in this country is in low skill, low wage jobs—not the good jobs that provide living wages and economic security for working families.

Across many industries, unions are pressing employers to change course and choose the high skill option. They are seeking ways to participate in decisions that affect how work gets done, including changes in work processes, technology, and worker skills (the three factors discussed in Chapter 1, "Agenda for a Changing Workplace"). As a result, some unions have experienced successes in establishing high skill work organizations, developing voluntary skill standards, and empowering workers to exercise their full range of basic and technical skills.

Few Employers Offer Enough Training

Updating the skills of employed workers is largely an employer's financial obligation. We can't expect the publicly funded schools and training programs to do it for them—their resources are already strained, and most of the people who need help are out of school and working. Yet most workers aren't getting access to the training they want and need.

Only about 10% to 16% of employees receive formal training of any kind from their employers, various government-sponsored studies show. This training represents an employer investment of some $55 billion a year, according to an analysis by the American Society for Training and Development. That may seem like a substantial investment, but it's less than 2% of the national payroll and only one-ninth of the amount spent on capital equipment—far from enough.

The workers who are better educated to start with get most of that employer-provided training. College-educated employees are twice as likely to receive training on the job than those with a high school education or less. So the less formal education you bring to your job, the less likely your employer is to invest in educating or training you.

Furthermore, most employers concentrate their paid training among a managerial "elite." The great majority of workers, those who produce the goods and deliver the services, go without.

Very little of the training offered by employers is devoted to basic literacy skills. Only 1% of all employer-provided training deals with basic reading, writing, math, or English as a second language, according to the Labor Department's Bureau of Labor Statistics (BLS). Fewer than 3% of larger employers offer any basic skills training at all.

If companies devoted even 10% of their annual training budget to basic skills, it would make an "enormous difference" in workers' access to this education, Forrest Chisman asserted in *Jump Start*, a landmark study of adult literacy policy.

Unions aren't alone in the view that employers' training budgets are woefully inadequate. The federally appointed Competitiveness Policy Council urged greater employer investment in training, particularly for front-line workers who need to assume increased decision-making authority and skills in new work systems. Employer groups such as the National Association of Manufacturers find that those educational investments pay off on the company's bottom line, and research published by the Labor Department shows the payoff is even greater when workplace education is reinforced by changes in work practices that increase workers' participation in decision-making and permit them to share in financial gains.

Unions Are Catalysts for Workplace Education

Without pressure from unions, management's training budgets would almost certainly be even lower. Unions are often catalysts, urging employers to invest in training for all employees, not just managers and supervisors. Unions also contribute to education and training programs by negotiating for training trusts and other programs to be funded through collective bargaining agreements. In industries as varied as the building trades, manufacturing, hospitality, health care, communications, maritime, and the public sector, unions are increasingly utilizing these negotiated training funds to meet their members' education and training needs.

Through the collective bargaining process, unions also seek to establish a workplace culture that allows and encourages workers to maintain and upgrade their skills. Job security provisions, career ladders and lines of promotion, fair wages and benefits, safe and healthy working environments—all these reinforce the message that an employer truly regards employees as valued assets. Companies with good employee benefits are more likely to offer training, as are those that have adopted participatory workplace practices, BLS figures show.

The Twentieth Century Fund's retraining task force cited union-management training agreements as models for bringing education to the workplace. "The challenge is to find ways to encourage more firms to emulate such efforts," the task force report stated.

Public Programs Have Limited Reach

Throughout the years, the American labor movement has demonstrated its strong commitment to publicly funded adult education programs. Still, it is widely accepted that these adult education programs serve only 1% to 2% of their intended audience.

Although some individual programs are excellent, the adult basic education system as a whole is inadequately

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Improving the Public Schools Is Also Vital

Although this guide focuses on workers who are already out of school, the skills of tomorrow's generation of workers are being shaped today by the public schools. The labor movement continues to advocate school system improvements:

- **more stable and equitable public financing**

  The U.S. lags far behind other industrial countries in its investment in the K-12 public school system. A dozen countries outspend us as a percentage of gross national product, according to the labor-supported Economic Policy Institute. Better public education starts with adequate and equitable funding. This points to the need for government policies that foster a strong tax base through economic development and high wage jobs.

- **more individualized teaching**

  Too often our overcrowded public schools resemble understaffed assembly lines where teachers don't have time or resources to give adequate attention to each student. Our teachers need support in creating the kinds of classroom environments that allow them to assist students with their individual learning needs.

- **more rigorous standards**

  Coursework needs to meet consistently high standards to prepare young people for jobs, higher education, and our democratic system of government. Exposure to career paths should be part of every student's public education experience.

funded and tends to get low priority among competing educational demands at the state level. A variety of other federal and state programs offer limited basic skills services—such as the vocational education system, state and local job training programs for disadvantaged jobseekers, and state programs for welfare recipients. Recent trends toward consolidating these and other workforce development programs at the state level simply throw these programs into competition with other education providers for scarce funds.

Federal leadership and funding for literacy education has been important in drawing national attention to basic skills issues, but it has not been consistent, fluctuating according to political and budgetary realities.

Volunteer organizations are attempting to supplement these publicly funded programs. As we noted in Chapter 2, "Unions' Stake in Workplace Education," the volunteer movement is

not highly experienced in workplace-based programs, but national literacy groups such as Literacy Volunteers of America and Laubach Literacy Action are seeking to expand their knowledge about workplace literacy strategies.

More Public Investment Is Needed

More than half of the adults who enroll in traditional adult education programs drop out before they achieve their learning goals. For those who stay in the programs, too often improvements are small. These adults would benefit from a wider range of education and training opportunities that they could access in their workplaces and communities.

This country can't accomplish its education agenda without making a substantial commitment of public resources to adult learning. At the same time, employers have a responsibility to support training and education. The labor movement sees a need for dual commitments: Increased funding for adult education at all levels of government on the one hand, and greater financial investment by employers on the other.

"Human capital" can actually contribute far more to productivity gains than capital equipment. A landmark study by Brookings Institution economist Edward Denison showed that 75% of the rise in productivity in this country between 1929 and 1982 was the result of advances in knowledge and increases in worker education. By contrast, increases in machinery, plant, and equipment contributed only 15% to productivity growth. More recent research shows this continues to be the case.

These statistics show that workers and their unions aren't the only ones who benefit from education and training. Investing in workers' skills is equally critical to the vitality and competitiveness of our national economy.

4 A Worker-Centered Learning Strategy

Unions have developed a highly successful worker-centered approach to workplace education. Programs are developed around workers' needs, and workers—through their unions—determine the program design. Basic skills are taught as part of the education and training services offered to all workers, regardless of their skill level. "Worker-centered" doesn't mean that workers get all the benefits, because employers benefit, too. Therefore, these programs are often developed jointly through the labor-management relationship.

Our Strategy Focuses on Workers' Needs

Unions' education and training programs are rooted in the needs of their members, the learners. They are *worker-centered*. This means that workers, through their union, have a central role in developing the programs. Their needs determine how the programs are designed, what they offer, and how they are taught.

The worker-centered strategy recognizes that learning is a democratic, inclusive, and open process. Ideally, program content is as broad as possible, not limited to the most basic literacy skills. Opportunities for education or training are designed to appeal to all workers. Individual needs and differences are respected, and each learner takes responsibility for setting his or her own learning goals.

This approach enables workers to fulfill many different kinds of learning objectives—from occupational advancement to self-improvement. As workers meet their personal educational goals, they'll also prepare themselves for other life situations. The reading skills they want so they can read to their children, for example, will also help them in their jobs and in their communities.

A worker-centered approach does more than help workers acquire new skills and knowledge, though. It helps them gain confidence in their individual and collective abilities and to assume greater control over their lives.

Building on this concept of worker-centered learning, unions have established workplace education programs that stand as models for the nation.

This Also Benefits Employers

"Worker-centered" doesn't mean that workers are the only ones who benefit from this approach to learning. Their employers gain, too. In workplaces moving toward participatory work systems, everyone benefits when workers practice those same participatory skills in formulating their training programs.

Because of this, worker-centered programs are often developed in the context of the collective bargaining relationship between unions and

What Is Worker-Centered Learning?

Keys to a worker-centered approach to learning include:

1. **Worker-centered learning builds on what workers already know.**

   Education starts from workers' strengths, not from their deficiencies. Readers and non-readers alike bring a range of knowledge and skills to their classroom. A worker-centered program recognizes that this range of experience is part of what it means to be "literate" today. See Chapter 3, "Basic Skills in Today's Workplace."

2. **Worker-centered learning addresses the needs of the whole person.**

   A hallmark of the worker-centered program is its concern with the individual's total needs. It seeks to educate the whole person—not just to help workers perform their present jobs better, but to enlarge and enrich their capabilities as individuals, family members, trade unionists, and citizens. See Chapter 5, Step 2, "Identify Your Members' Needs and Goals."

3. **Workers and their unions are active in developing and planning these programs.**

   Worker involvement from the very beginning is critical to ensure that programs support workers' learning goals—and that they do not in any way jeopardize workers' jobs or earnings. See Chapter 5, Step 1, "Lay the Groundwork."

4. **Decision-making is a participatory process.**

   A "bottom-up" decision-making structure keeps programs closely attuned to workers' needs. It also helps ensure that programs are responsive to the views and concerns of workers. See Chapter 5, Step 1, "Lay the Groundwork," Step 4, "Define Your Union's Role," and Step 9, "Keep Your Program on Track."

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employers. These negotiated training agreements meet the needs of workers along with the needs of the employer. Financial support for training and education programs can be established under the collective bargaining agreement along with wages and benefits.

Unions have gained wide recognition for their worker-centered learning strategy. "Unions are fast becoming leaders in providing career-related training to individual employees," the American Society for Training and Development

What Is Worker-Centered Learning? – *continued*

5. **Workers have equal access to programs in their workplace.**

   Access is as broad as possible (within the limits of available resources), so workers can participate regardless of their present reading skills or their current job classifications. Participation should be voluntary. See Chapter 5, Step 8, "Encourage Your Members to Participate."

6. **Curriculum content and program structure reflect the diverse learning styles and needs of adult workers.**

   A worker-centered program respects different adult learning styles. Workers' active participation in setting their own educational goals helps build their confidence and self-esteem at the same time as it fosters classroom learning. Group learning exercises capitalize on the support workers can provide one another. See Chapter 5, Step 7, "Design the Worker-Centered Classroom."

7. **Workers are involved in helping to design any tests or assessments.**

   Recognizing the limitations of most standardized tests and their frequent misuse, worker-centered programs keep these tests to a minimum. Learner-involved assessment is used to support learners' goals and provide positive feedback on their progress. See Chapter 5, Step 9, "Keep Your Program on Track."

8. **Classroom records are confidential.**

   Workers are assured of their privacy, and they can be confident that their performance in the classroom will not be shared with their employer. See Chapter 5, Step 8, "Encourage Your Members to Participate."

9. **Basic skills education may be just one part of a larger strategy to meet workers' changing needs.**

   Basic skills instruction is often tied to a broader worker-centered education and training strategy. It may also be part of a larger agenda that addresses job security, wages and benefits, safety, and other needs. See Chapter 1, "Agenda for a Changing Workplace," and Chapter 2, "Unions' Stake in Workplace Education."

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asserted in *Train America's Workforce*. The U.S. Department of Education singled out unions' "worker-driven" approach for special praise in *Workplace Literacy: Reshaping the American Workforce*, noting that "employees are involved at every stage, from the pre-proposal focus groups to curriculum design, recruitment, and program evaluation." The federal Competitiveness Policy Council pointed out that the value of "*real* employee involvement" in training and work organization activities has been documented time and again.

We've Learned from Unions' Experience

As unions have applied these principles of worker-centered learning to their own programs in a variety of settings, we've learned some lessons.

We've learned there's no quick fix for education and training needs. There's no magic pill we can offer our members. The teaching approach that works best for one adult may not be appropriate for another. A successful program for adult workers recognizes those varied learning styles and offers a mix of approaches.

We've learned about the harm these programs can inflict on our members if they're not done right. Unions must be alert to potential abuses (as described in Chapter 2, "Unions' Stake in Workplace Education"). A workplace literacy program isn't the quick answer to every workplace problem. It may be part of the solution, though. The complete strategy must be developed through labor-management dialogue on the broader issues of how work gets done in the changing workplace.

Labor-involved education and training programs are among the models most widely cited for their effectiveness. Their accomplishments can be traced back to unions' special understanding of the needs and interests of the workers they represent.

Researchers at the City University of New York made these observations on labor's unique capabilities, in an evaluation of two large multi-union education programs in New York City:

> "Trade unions are effective purveyors of this new educational medium [workplace literacy] because they are in daily contact with workers and therefore have an intimate knowledge of their personal and workplace needs; they understand the problems peculiar to worker education; they are trusted by their membership to work on their behalf; they have the experience and contacts to establish needed programs; and they speak the language of the average working man and woman."

Those researchers added that attendance and retention rates in those union programs were generally far better than in adult education programs designed for the general public.

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Unions have applied the strategies discussed here in a variety of ways. Some unions actually run programs themselves. Some operate programs cooperatively with other unions or jointly with employers. In still other cases, the union's role is to link its members to the educational resources that are available through the schools or other community organizations.

You may have greatest control over a program if your union is in charge, but not all unions are in a position to take on operational responsibility. Each union must devise an approach that's appropriate to its own needs and opportunities. In Chapter 5, "How to Design a Worker-Centered Program," and Chapter 6, "What to Do If You Don't Operate a Program," this guide suggests how you can do that.

Organized labor has always been the avowed enemy of illiteracy.

—1918 Convention Resolution, American Federation of Labor

Union members have no higher duty than to help ensure that everyone has the opportunity to acquire the skills and knowledge they need to improve their working lives and be rewarded for attaining such skills.

—1997 Convention Resolution, AFL-CIO

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PART II

Designing a Worker-Centered Program

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5 How to Design a Worker-Centered Program

Sponsoring your own workplace basic skills program is one way of advancing your broader union-building goals. You'll find that developing a worker-centered program involves many of the same steps you've gone through before with other programs.

In this chapter, we'll describe the nine basic steps to establishing your union's own workplace education program:

Step 1. Lay the groundwork

Step 2. Identify your members' needs and goals

Step 3. Negotiate funding

Step 4. Define your union's role

Step 5. Develop links with the education community

Step 6. Outline a plan of services

Step 7. Design the worker-centered classroom

Step 8. Encourage your members to participate

Step 9. Keep your program on track

Keep in mind that you'll often be involved with several steps at the same time. For instance, you may want to open your discussions with education agencies (Step 5) as soon as you've identified your members' educational goals (Step 2).

Built into these steps are checks and balances that ensure your program will meet the needs of the learners, your members.

As with the labor movement itself, where democracy is a cardinal principle, the design of your worker-centered program should reflect your members' needs and interests.

Ideally, its structure will engage workers actively in their own education. And its participatory approach should provide channels for your members to express opinions, voice needs, and find remedies to legitimate concerns about their educational program.

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STEP 1 Lay the Groundwork

Building on your union's current education program or an existing joint labor-management structure, you'll want to plan your new program as an integral part of the union's services to your members. When planning a negotiated program, your first objective is for you and the employer to agree on the program's general principles. Then outline your intentions in a joint letter of intent.

Tap Your Union's Planning Resources

As in planning other kinds of union programs, you need to designate a planning group or task force to look into establishing a workplace basic skills program. That planning group is likely to evolve into a more permanent board or committee if and when a program is started.

Therefore it's important that the members of the planning group have the time, interest, and ability to give the program the attention it requires. It's also helpful to include some of the workers likely to participate in the new program.

Whenever possible, link this planning effort to any related activities in which you're already engaged. For instance, if your union is already involved in education or training, you have expertise to build on.

Most likely, one or more of the union's principal officers will assume a leadership role in order to plan and launch a sound program. If you're planning a joint program with an employer, your existing labor-management structures provide a foundation for joint planning. An existing labor-management committee, for example, could serve as the core group for initial planning. Even when there has been a confrontational history between the employer and the union, an education program may be an area in which you can come together and find common ground.

You may want to make an informal inventory of your union's leadership resources. Who has special capabilities or knowledge useful for planning and operating the program? The issue of workplace education may spark the interest of members who haven't been active in the union before, giving you

access to new resources among your members.

Your international or national union representative and your union's education staff can provide valuable planning assistance. Particularly when national collective bargaining agreements are involved, you will want to contact them at an early stage of your planning.

Develop a Broad Planning Base

For a successful program, you'll need a participatory planning process, so the union can tap as many resources and ideas as possible. Although "top-down" planning may be appropriate in some situations, it's out of place here in all likelihood. Since your members can have such a variety of learning needs and interests, it's unwise to impose a "generic" program from above. Instead, it must be firmly grounded in the real needs of the workers as they themselves perceive them.

The "bottom-up" decision-making processes you establish in the planning stage will also be important when the program gets underway. You'll need feedback from workers on how well the program is doing. That will help you ensure that the program remains accountable to the workers it serves.

Lay Out the Ground Rules

Planning a basic skills program in the workplace has been described as a *political process*—and for good reason. The employer and union are likely to have different perspectives on why they want the program. Those different interests must be balanced and brought together in a way that everyone can support. Often this agreement is stated

Planning Initiatives

Early initiatives of the planning team are likely to include:

- **articulating** the program's goals and objectives
- **explaining** the program to their constituencies to gain their support
- **developing** the procedure for assessing workers' learning needs and goals
- **determining** appropriate responses to those learning needs
- **assessing** the availability of resources for the program
- **planning** the educational and training services
- **developing** relationships with educational providers
- **establishing** the program's administrative structure

in a joint letter of understanding or letter of intent. Therefore, one of your first goals will be to reach agreement on the program's general principles and to state them in a joint letter of intent. (See the "Sample Letter of Intent" at the end of this step.)

At this early stage of planning, the joint letter cannot provide complete details about the program, since you won't yet know what these will be. But it should address the broad principles of the program. There must be a general understanding about what the respective roles of the union and employer will be. From this consensus, you and the employer can plan together how the program will be carried out. Your specific roles and responsibilities will be spelled out later.

One of the most critical ground rules is that the union should be an equal partner with the employer in a joint program. If the employer doesn't fully recognize an equal role for the union, you will probably find it difficult to ensure that your members' interests are met. Missing from the employer's unilateral program will be the minimum level of trust and adequate safeguards that are essential for creating an effective learning environment in the workplace. As the American Society for Training and Development accurately observed in its *Workplace Basics* study:

> "Without employee concurrence and cooperation, the Workplace Basics program will never leave the launching pad."

In a unionized workplace, that concurrence is given through the union. If the union doesn't have an equal partnership role, we strongly advise you not to support the proposed program, and to inform your members of your concerns about it.

As part of your joint letter of intent with the employer, you may want to state that the program will be open to all workers on a voluntary basis, with no penalty for those who decide not to participate.

Another important ground rule is the confidentiality of classroom activities and tests.

These principles are critical for assuring the prospective learners that the program will not jeopardize their future employment.

Sample Letter of Intent

This is a sample agreement to begin a pilot education program.

Union and Company representatives have recently held a number of discussions on the basic skills required to maintain our competitiveness and increase workers' opportunities for job security and advancement in current market conditions. These discussions have resulted in a clearer understanding between the parties of the mutual benefits to be derived from basic skills education, and a commitment to jointly explore the possibilities of creating a pilot Education Enrichment Center at the Company. The following summarizes our understanding on the formation of such a center:

- An Education Enrichment Committee comprised of an equal number of union and management representatives will establish policies on curriculum, hours of operation, publicity, and other details related to the operation of the program. The Committee will be co-chaired by Union and Company representatives.
- The Education Enrichment Committee will have responsibility for the center's budget.
- The center will be open to all active employees in those areas identified for the pilot, on a voluntary basis. Enrollment and withdrawal will be totally at the individual employee's option. The Union and Company will make a determination about compensation for class attendance (e.g., on-the-clock, on employees' own time, or a combination). Establishment of this program will have no impact on the Company's current or planned training activities for which employees are scheduled by management and receive full compensation.
- Employees electing not to utilize the center or electing to voluntarily withdraw from programs offered by the center will not be penalized in any way.
- An employee's enrollment status and his or her progress with respect to any program or course of study offered by the center will be strictly confidential. When enrollees participate in testing or other evaluative measures, the Company and Union may obtain aggregate results to appraise program effectiveness, but individual scores will be confidential.
- The operation of the Education Enrichment Center will be consistent with the terms of the collective bargaining agreement.

(Signed)
Company Industrial Relations Manager

(Signed)
Local Union President

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STEP 2 Identify Your Members' Needs and Goals

Your members have diverse reasons for wanting education or training. Their needs and goals will be the basis for your program. By involving workers in a needs assessment, your union can help them articulate their goals. At the same time, an "employer training inventory" enables you to gauge how well existing training is meeting your members' needs. Involving workers in the needs assessment eliminates the need for troublesome "literacy audits."

Find Out What Workers Want

Everyone has personal reasons for wanting more education or training. When you plan a program, you have to find out what your members' educational aspirations are. Workers will want to participate in your program when they feel it can help them reach their own goals.

Workers' educational aspirations can go far beyond the workplace walls. A worker-centered program addresses those individual aspirations—not just the skills workers need for particular jobs, but education and training needed to achieve personal life goals. A worker-centered program does so in a way that respects the dignity and intelligence of the individual learner. And it does so in a way that supports the union's broader workplace goals. As researchers from the City University of New York commented in their evaluation of two union-sponsored programs in that city:

> "Invariably, students grew even more enthusiastic about their union relationship as a result of taking these courses."

By addressing the needs of the whole person, a union-sponsored program not only educates, but it also empowers. It opens doors to better jobs, but it also gives workers the skills and confidence they need in their roles as citizens, parents, and advocates for themselves and their families.

The diversity of your members' potential educational goals is illustrated on the next page, in the box "Reasons Why Workers May Want a Basic Skills Program."

Do Your Own Needs Assessment

You know your members have education and training needs—as all workers do. It's your task as a union leader to assist your members to define them.

Reasons Why Workers May Want a Basic Skills Program

- **to qualify** for a promotion at work
- **to learn** skills that can lead to new kinds of work
- **to meet** job certification requirements
- **to get** a high school equivalency diploma
- **to prepare** for college
- **to take** college courses or to earn a degree
- **to meet** citizenship requirements
- **to learn** English as a second language
- **to master** functional skills needed in everyday life
- **to read** to their children or grandchildren
- **to help** their children with schoolwork
- **to enrich** themselves intellectually
- **to feel** better about themselves
- **to participate** more actively in their community and union
- **to become** a more informed citizen and voter

You don't have to rely solely on outside experts to gather information about your members' needs and interests. You have the expertise to make your own assessment. In doing this needs assessment, you'll draw primarily on information you gather from discussions with your members. Their participation in the needs assessment will help them articulate their reasons for wanting an education or training program. Their involvement will also help build support for the program.

As the workers' own organization, the union has a unique understanding of its members and their jobs. As we've noted in Chapter 2, "Unions' Stake in Workplace Education," your members are more comfortable discussing their education and training needs with their union than with their supervisors. You are in a special position to help workers identify and define their goals: educational goals, career goals, and personal goals. You're also uniquely situated to translate those goals into a program that serves their needs.

The goals of a workplace literacy program can't be imposed by the employer. The reason for this was well stated by James L. Turk, then-director of education for the Ontario Federation of Labour in Canada:

> "The fact that they are not *employers'* programs is important. They must be, and be perceived to be, the workers' own programs—dedicated to workers' needs. . . . People only learn when they want to learn, not

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when someone wants to teach them. Trying to impose a workplace curriculum is as bad as trying to impose any other curriculum."

When you involve workers in defining the program's goals, the program will have a clear identification with workers. They will feel comfortable about participating.

In a joint labor-management program, the needs assessment is certainly part of the political process that we described in Step 1. Labor and management will each have its own needs and goals. Where workers' goals may be quite personal (see the previous box, "Reasons Why Workers May Want a Basic Skills Program"), employers' needs may be strictly economic: to train workers for new equipment, for example, to make the company more competitive. Their differing perspectives must be reconciled in the program's design. Mistrust and apprehension can be avoided when planning is truly joint, with workers participating as an equal partner through their union. An existing labor-management committee, for example, might serve as a forum for discussing your different goals and priorities.

We've suggested a framework for your needs assessment in the "Sample Questionnaire for a Needs Assessment," which appears at the end of this step. You can cover these questions in consultations with union officers, union members, and appropriate supervisory personnel. Small group discussions provide a good setting for gathering this information. If it's a joint program, you'll bring your findings to your joint

Selecting an Outside Expert

If your union decides to engage a consultant to help with the needs assessment, or if you later decide to hire a curriculum specialist to develop instruction, here are some tips to help you select a qualified expert.

- Good technical skills are important but they're not all you're looking for. If outside experts don't understand what you and your members want, you'll have a hard time working with them, and their usefulness will be severely limited. It's much the same as choosing a good lawyer or arbitrator for your union.
- Choose someone who's knowledgeable about your industry and the work your members do.
- Find someone who is familiar with your union and understands the issues of concern to your members.
- Does the consultant share your core values about work, social justice, and the role of unions?

discussions with management. In either case, the answers you collect will help you—

- assess the skills your members need in the workplace,
- assess their broader educational goals,
- determine what training or education would help them meet these needs, and
- determine what additional supportive services they need.

Analyze Skill Demands in the Workplace

For your needs assessment, you should review your members' jobs and the skills required to perform them, including any proposed or recent changes. If new equipment or new work processes are anticipated, they may well affect the skills needed to do the work.

Unions have a broad range of technical experience that is useful in assessing the basic skills used in the workplace. As a union leader, you do not have to defer to educators or personnel officers on job analysis issues. In fact, unions are just as qualified as employers and outside "experts" to engage in an assessment of workplace basic skill needs. For example:

☐ **job descriptions**

Your union has probably worked on job descriptions in collective bargaining. You may even have done your own job classification studies. You can make sure that job descriptions present a complete, current picture of each job, as a

Facing New Testing and Certification Requirements

Many unions face new laws or regulations that require workers to be licensed or certified to perform certain jobs or tasks. Unions frequently work actively at the legislative or regulatory level to assure that licensing and certification requirements will not compromise job security, staffing levels, collective bargaining agreements, or promotional opportunities. When your union believes that credentialing will be beneficial—or when you cannot stop its implementation—an education and training strategy can help your members. This strategy might include:

1. Work with the regulatory agency to determine whether credentialing tests are actually required in your members' jobs.
2. Seek to exempt present workers from new tests or other requirements on the basis of their demonstrated work experience.
3. For new members or others who will need to pass tests for certification or licensing, develop a learning program that covers both occupational skills and basic education skills, including test-taking techniques. Even experienced workers are likely to feel anxious about taking the tests, and these "prep" classes can help.

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basis for determining what skills are required to perform those jobs.

- ☐ **skill analyses**

  To support grievances, many unions have prepared studies of the skills and duties required for particular positions. By combining that experience with interviews of the workers who hold those jobs, you can conduct a fair and balanced study of the skills needed to perform specific jobs.

- ☐ **worker qualifications**

  Your union may also have conducted reviews of workers' skills and qualifications to perform their jobs, to support grievance cases. You can use the same approach in analyzing current skills and projected training needs.

In each of these areas, workers will contribute unique insights into the job content and skill requirements of their positions. They are often in the best position to pinpoint problems in work processes. They will usually be keenly aware of those operations that require more advanced skills in reading, math, or communication.

Your union may be able to use this kind of analysis to document increased skill levels required because of workplace changes in each occupation the union represents. Those findings may also help you document the need for wages and benefits commensurate with the skills workers use in their jobs.

Assess the Current Gaps in Training

The best way to find out if your members already have access to the education and training they need in their jobs is to make your own assessment of their employer's existing programs. Steps for taking an inventory of the training provided at the workplace appear in the "Employer Training Inventory" on the next page.

To advance your union's broader workplace agenda, you'll want to consider how to build on the existing education or training activities that you've identified through your inventory. If basic skills are not already being addressed, you may want to negotiate a more comprehensive education and training program that includes those skills. Your inventory of the employer's training efforts, together with your assessment of members' education and training needs, will help you demonstrate what training gaps exist and how best to respond.

The employer training inventory will document what is being done formally to help workers update their skills. If the employer doesn't offer formal education or training, workplace learning undoubtedly is taking place informally. For example, experienced workers may explain job duties to newer employees. When the training inventory alerts you to a lack of formal skill renewal efforts, you may be able to correct those shortcomings through a new program.

Employer Training Inventory

To document what's being done to help your members update or maintain their skills, answer these questions about your employer's existing education and training activities. Any training gaps you identify will show you where new programs are needed.

1. Who is getting education or training opportunities now?
2. What kinds of skills are they learning (occupational, academic, English as a second language, citizenship, or some combination)?
3. What is the stated purpose of this education or training (new hires, job advancement, new equipment, tuition reimbursement)?
4. Who provides the education or training?
5. Is training done in a formal setting (taught by an instructor in a classroom) or an informal setting (taught by a co-worker on the job)?
6. What are the actual outcomes (how many workers finish training; how many move up to new jobs; how many complete a high school equivalency program)?
7. How do workers feel about these programs after participating in them?
8. How do workers in general regard the employer's training efforts, whether or not they've participated in them?
9. What is the union's role (determining learning needs, developing curriculum, selecting learners, selecting instructors, conducting training classes, counseling learners, evaluating results)?
10. Are these programs jointly negotiated under the collective bargaining agreement?
11. How were workers' education and training needs determined?
12. What additional needs are there that aren't being met?
13. How do workers get into the education or training program?
14. Is participation voluntary?
15. Is the method of instruction appropriate for adult learners (showing respect for learners, relating subjects to the workers' lives, using varied instructional approaches)?
16. Do classes take place at convenient times and locations? On work time or after hours?
17. How much money does the employer currently spend for education and training programs?
18. How much of that investment goes to train your members and other nonmanagerial workers?
19. How much is spent to educate or train workers through joint negotiated funds?

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Appraise the Need for Support Services

Beyond the specific education and training needs you've identified, your members may also benefit from support services. Support services are intended to help them overcome obstacles to education or training. For example:

- **educational counseling**—to help workers set their own educational and career goals and strategies, and to give support while they are attending classes
- **educational referrals**—to help workers locate the local agencies and institutions where they can continue their education or training after completing the workplace learning program, particularly when they can take advantage of tuition assistance or other continuing education support negotiated by their union
- **social services counseling and referral**—to assist in resolving financial or family problems that otherwise prevent workers from furthering their education
- **child care**—to help parents find caretakers for their children while they are in class
- **disability accommodations**—to assure that workers with disabilities will have full access to the learning program
- **support in the workplace**—to follow through on the learning program; for example, putting workplace materials into clear language, resolving production problems that affect workers' productivity and morale, training experienced workers as mentors or counselors

These support services can be coordinated with other negotiated benefits that may be available to your members, such as child care. AFL-CIO Community Services staff can help you expand your union's existing contacts with local agencies and organizations that provide other needed services.

Many unions find that workplace education programs are most effective when they are tied to a comprehensive network of support services. Developing your own network, you'll draw on the relationships already established by your union, the central labor council, and the state AFL-CIO with the many public and private nonprofit agencies in your area—social service organizations, churches, community groups, and the like.

Protect Members from "Literacy Audits"

Employers sometimes insist on conducting formal "literacy audits" or job task analyses as a first step in designing a basic skills program. But you must be alert to their dangers. At a minimum, they are likely to stir up workers' anxiety about the proposed education activity. At worst, these audits create an arbitrary standard for evaluating workers' performance, placing workers' jobs in jeopardy.

Literacy Audits: Potential for Abuse

Too often literacy audits are used to justify management decisions that jeopardize workers' jobs and earnings:

- Supervisors may use test scores as their primary evaluation standard, regardless of how workers are actually performing their jobs.
- Workers with low scores may be replaced by new hires.
- Workers may be pigeonholed in positions that have no advancement potential.
- Workers may be denied future wage increases on the basis of skill deficiencies identified in the literacy audit.
- Job classifications may be assigned a "grade level" and workers may be disqualified from bidding on them because of their test scores.
- Management may cite identified "skill deficiencies" to justify its opposition to subsequent wage or benefit increases.

These examples show why you will probably refrain from endorsing a proposed program unless the union is a full partner from the earliest stage of planning, where you can look after members' long-term as well as immediate interests.

A literacy audit tests workers' reading, writing, math, and reasoning skills. It often involves giving standardized adult basic education tests to all or most employees. Even worse, sometimes "problem" employees are singled out and tested.

Some employers accompany the literacy audit with a job task analysis, where management consultants observe workers to determine how they do their jobs and what skills they use. Findings from the job analysis and literacy audit can be compared to show whether workers possess the skills that they purportedly need for their jobs. Then, in theory, skill upgrading programs can be designed to address the specific demands of the jobs.

The problem is that a literacy audit undermines the minimum level of trust that's essential for a successful workplace learning activity. Often employers embark on literacy audits even before labor and management have agreed on whether to operate a program at all. If workers haven't yet become convinced that a workplace education program will serve their interests, the prospect of literacy testing can understandably create genuine apprehension. Workers may justifiably fear that test results will be used to penalize low performers instead of helping them. Since their union isn't a party to the testing plan, they have no advocate to protect their interests, and they have reason to be skeptical of management's reassurances. Their skepticism may be even greater if they have recently witnessed layoffs or watched new technology being introduced. In these circumstances,

unions find it difficult, if not impossible, to endorse the program.

Literacy testing and observation of workers don't belong in a worker-centered learning program unless the union is fully involved in the decisions about how they will be performed and how findings will be used. You don't actually *need* them to start planning a program. You can find out what you need to know in the initial stages of planning through the approaches we've discussed here and in Step 1 ("Lay the Groundwork"): a planning team—drawn from union and employer representatives—and a needs assessment process that involves workers in identifying their education and training needs. From this joint process, your union and the employer can agree on the need for a program without going through formal testing. From there you can jointly develop any studies needed for further planning.

At that stage, you may determine that it's appropriate for your union to participate with the employer in a jointly designed and conducted job analysis, to document the skills workers need in their jobs. If so, you may wish to consider a job analysis as described on the next page, in the box "Criteria for Worker-Involved Job Analysis."

Understand Legal Issues on Testing

Before you endorse any form of literacy testing, we advise you to be aware of the potential legal liabilities. When an employer uses tests as the basis for any employment decisions—hiring, training, promotion, demotion, layoff—then those tests must meet the criteria for nondiscrimination under applicable laws. Applicable federal laws may include Title VII of the Civil Rights Act of 1964 and the Americans with Disabilities Act of 1990 (ADA).

Both of those federal laws bar employment-related tests that have a discriminatory impact on the groups they protect. Title VII protects workers on the basis of race, national origin, sex, or religion. ADA protects qualified individuals with disabilities, meaning persons who are capable of performing the essential functions of a job, with or without reasonable accommodations. Tests that have a discriminatory effect on these protected groups are illegal even if the employer didn't *intend* to discriminate. If your union agrees to an employment-related education program or literacy audit that uses one of these tests, the union could also be liable under these laws.

The U.S. Supreme Court has interpreted Title VII to mean that tests cannot be used as the basis for employment decisions unless they meet these criteria:

- **impact on protected groups**

  Is any protected group adversely affected? (This is usually shown with statistics and evidence of practical effect.) If there is no adverse impact, the test is acceptable under Title VII. If it excludes any group disproportionately, the test must meet all of the next criteria or else it cannot be used.

Criteria for Worker-Involved Job Analysis

If your union has determined that it is in the best interests of your members to participate in a job analysis, the following criteria can help you to develop meaningful worker involvement in analyzing their jobs.

- Union leadership determines the proposed job analysis process and describes it to its members:
  - — how job classifications will be selected for inclusion in the study
  - — how a supportive consultant will be selected (if desired) to work with the union in performing the analysis
  - — how workers will participate in analyzing their jobs
  - — how the findings will be used
- Workers are involved in preparing the description of job duties for their positions.
- No job observation is performed without the cooperation of the workers involved, and then only with plenty of advance time for planning and union monitoring.
- Job tasks are analyzed to show the range of basic and technical skills that contribute to the performance of each job—not to set a minimum grade level or other criteria to screen workers out of jobs.
- Union representatives participate in setting the performance criteria to be used in reviewing how workers perform their current jobs.
- Job analysis findings show an understanding of the growing training requirements in the workplace, rather than emphasizing workers' "skill deficiencies."
- Workers receive assurances that job analysis findings will be used only for a general assessment of skills and training needs—not as a basis for transferring, firing, promoting, or limiting the future wages of those whose jobs are assessed.
- Workers are offered the opportunity to learn new skills to meet identified needs, if they so choose.
- Unions participate in establishing a worker-involved process for setting education and training goals.
- Individual workers help set training goals for their own jobs, in cooperation with their supervisors, using job analysis findings.

☐ **job-relatedness**

Is there a correlation between test performance and job performance? The test must be validated to show that connection. A validated test may be acceptable even if it adversely affects protected groups.

☐ **business necessity**

Is there a legitimate business need for the test? If the test has an adverse impact on protected groups, the employer must show why its use is consistent with business necessity.

0 [illegible]

☐ **no better alternative**

Even when the employer shows job-relatedness and business necessity, the test may still violate Title VII if the employer was given a valid and effective alternative employment practice that had a less adverse impact but refused to adopt it.

Under ADA, as with Title VII, employers are prohibited from using job criteria, including tests, that screen out individuals *because of their disabilities* unless the tests are related to the position and consistent with business necessity.

ADA requirements for workplace accommodations may also be relevant. To accommodate special needs of workers with disabilities, it may be appropriate to modify a test, make changes in the employer's training policies, or provide readers or interpreters.

When an employer is determined to test workers' basic skills, you should know your members' legal rights and the restrictions that may apply to the use of tests. You may want to consult with legal counsel. Federally approved procedures for employee testing appear in the Equal Employment Opportunity Commission's *Uniform Guidelines on Employee Selection Procedures* (listed in Appendix C, "Useful Reading").

Sample Questionnaire for a Needs Assessment

You can use these sample questions in your discussions with union officers, union members, and supervisors to gather initial information on your members' education and training needs, including basic skills. (This is not suggested as a format for a written questionnaire to be sent out.)

A. Discussions with union officers, stewards, and staff:

1. What changes are taking place in the workplace?
   - Has new equipment or new technology been introduced?
   - Have work practices changed?
   - Have layoffs occurred?
   - Have new jobs been created? Or old jobs restructured?
   - Has the use of temporary or part-time workers increased?
2. Are members troubled by new assignments?
   - Problems with computers or other new equipment?
   - Difficulty with assigned job duties?
   - Problems related to the new structure of work, such as teamwork?
   - Concern about increased reading, writing, or math?
   - An increase in grievances filed over new job assignments?

(questionnaire continues on next page)

Sample Questionnaire for a Needs Assessment – *continued*

3. Are workers aware of new job opportunities, and do they apply for the jobs?
   - Do new job openings have formal education requirements?
   - If so, do your members meet these requirements?
4. Do members attend local adult education programs?
   - Are they satisfied with the programs?
   - Have they dropped out of such programs?
5. Does the union (or employer) offer a tuition assistance program?
   - How many members take advantage of it?
   - Are there patterns in who uses it (by job classification, age, sex, race, ethnicity, etc.)?
   - What kinds of classes are members taking?
6. Do members understand the terms and conditions of their fringe benefits, such as health, legal, and education?
7. Do licensing or certification requirements affect members' jobs?
   - Will workers have to be tested?
   - Are they getting assistance to prepare for the tests?

B. Discussions with union members:

1. What changes have you seen in your job?
   - Are you given adequate time and training to learn new skills?
   - What training are you getting to help you learn new job skills?
   - Are there changes you would make in work practices that would help you perform your job?
   - Does the equipment you use make your job easier?
2. Which of these basic educational skills do you use most in your work? Which ones do you use less often?
   - Reading?
   - Writing?
   - Oral communication?
   - Math?
   - Computer skills?
   - Identifying and solving problems?
   - Others?

(questionnaire continues on next page)

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Sample Questionnaire for a Needs Assessment – *continued*

3. What kinds of written materials do you use in your job?
   - Manuals?
   - Inventory sheets?
   - Report forms?
   - Operating instructions?
   - Safety notices?
   - Job descriptions?
   - Employee benefits handbooks?
   - Others?
4. What difficulties do you have when you use those written materials?
   - Hard to use?
   - Written in complex or confusing language?
   - English is not your first language?
   - Other specific problems?
5. What training have you received to help you use these materials?
   - Training or education in a classroom setting?
   - Informal training by another worker?
   - Other training?
6. Are the written qualifications for your job realistic, considering the work to be performed?
   - Are further skills appropriate for doing the job?
   - What problems do you encounter performing your work?
   - Should the work be redesigned? (If so, in what way?)
7. What would help you perform your job better?
   - Different equipment?
   - Different work practices?
   - Different supervisory methods?
   - More or less team work?
   - Education or training?
8. What additional skills would you need for job advancement?
   - How long have you worked in your current job?
   - What are the jobs to which you might advance (either with this employer or elsewhere)?
   - What new skills do those jobs require?
   - What training or education would help you acquire those skills?

(questionnaire continues on next page)

Sample Questionnaire for a Needs Assessment – *continued*

9. What kinds of outside reading do you do?
   - Reading for pleasure?
   - Reading newspapers and magazines?
   - Reading to your family?
10. Have you taken GED or adult education classes, or studied English as a second language, to improve your basic skills?
    - What did you like or dislike about that program?
    - Did you complete the program?
11. Are you interested in continuing your education?
    - What subjects interest you?
    - Would you like to complete your high school degree?
    - Take a college prep course?
    - Enter a college degree program?
    - Take a specialized technical course?
    - Learn basic computer skills?
    - Improve your English?
    - Study for the citizenship exam?
    - Take other courses?
12. Aside from work, how would further education help you with your home and in family responsibilities?
13. What additional services would make it easier for you to attend classes (for example, child care)?

C. Discussions with sympathetic supervisors:

1. What general problems do workers have performing their jobs?
2. What training does the employer currently provide to address this?
3. What changes might help workers perform their jobs better?
   - Restructuring of work processes?
   - New equipment?
   - More education and training?

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STEP 3 Negotiate Funding

A negotiated education or training agreement with your employer can provide the funding support your program needs. Supplemental government grants may prove useful as seed money to give the employer further incentive for investing in the program. Your negotiations will be framed in the context of your union's (and the employer's) broader agenda for coping with workplace change.

Broaden Your Discussions with the Employer

In your discussions with signatory employers, your union has the opportunity to broaden the discussion of workplace conditions to include skill renewal along with wages, working conditions, safety, and other issues. Jointly negotiated education and training programs can be an important component of your union's strategy for protecting your members' jobs while keeping their skills up to date. The growing public awareness of basic skill needs may make some employers more receptive to such a program than ever before. (See the box, "Bargaining over Education and Training," in Chapter 1.)

Obtaining the employer's support doesn't prevent your union from operating the program. Many well-established negotiated programs are union-operated. Those employers recognize that the union's imprint on the program can be critical to its success. Workers are more likely to participate and learn when they perceive the program as their own rather than management's. The trust that working people once felt toward their employers has badly deteriorated—as documented by a 1996 Hart Associates survey for the AFL-CIO, a national *New York Times* survey, and other research. That distrust will certainly extend to any training program that appears to serve management interests only. The employer needs to rely on the union in the joint program even more than the union needs the employer.

We urge you to look to a negotiated education or training agreement with your employer for several important reasons.

- ☐ **continuity**

  By tying the program to the collective bargaining process or labor-management relationship, you can deal with education and training needs in the context of other workplace priorities.

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- **funding stability**

  With a negotiated program, you can obtain a firm funding commitment for the period of your collective bargaining agreement. That is likely to provide you a more stable funding stream than year-to-year government or foundation grants.

- **timeliness**

  As we noted in Chapter 2, "Unions' Stake in Workplace Education," employers today are gradually becoming more aware of worker education needs. The national attention to literacy and lifelong learning, and the role workers' skills play in business competitiveness, has had some impact. Employer organizations and government leaders have taken up the cause of skill renewal. The time appears ripe to open discussions in your workplace on joint learning endeavors that include basic skills.

- **a problem-resolution process**

  Labor and management already have in place an established procedure for resolving problems. The grievance procedures under your contract can be made available to your members to ensure the program meets their needs.

- **nonfinancial support**

  In addition to providing funds, employers can contribute to the program's success through other kinds of support. Management staff who are knowledgeable about the employer's future plans can help you anticipate new skill requirements. The employer's training staff may help design work-related instruction. The employer may be able to donate appropriate training materials, classroom space (if you decide to hold classes at the workplace), tools and equipment from the workplace, and the like.

- **demonstrated success**

  As we show in the examples of joint programs cited in this guide, negotiated education and training programs are serving workers in virtually every industry. Their effectiveness is widely recognized, and joint programs are acknowledged models for workplace learning. Their success is based on the joint effort that allows programs to meet the needs of both labor and management.

Bring These Programs to the Table

Education and training become a subject for labor-management discussion in a variety of ways. It's a good idea to talk to other unions about how they have approached these discussions, and to get legal advice about your approach since there are a number of laws that apply to joint programs.

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Negotiated Programs Serve Virtually All Industries

Unions have been negotiating learning programs for decades. What's new with today's programs is their diversity and, often, their focus on skills used in innovative work systems. Unions large and small are involved in education and training in construction, manufacturing, government, service occupations, communications, transportation, and elsewhere throughout the economy. Basic skills may be integrated into classes on computers, labor history, or a wide range of other topics related to workers' jobs or their personal interests.

Some of the most widely acclaimed negotiated programs are the multi-million-dollar initiatives that unions have established at major manufacturing companies under national joint agreements. In the vanguard of these mammoth ventures, starting in 1982, came the education and training programs negotiated by the United Auto Workers with each of the big three U.S. auto makers. Another education giant is the International Association of Machinists' Quality Through Training Program at Boeing. The United Steelworkers of America have brought more than a dozen steel companies into their nationwide Institute for Career Development.

Outside the manufacturing sector, one of the most visible national programs is the Alliance for Employee Growth and Development established by the Communications Workers of America and the International Brotherhood of Electrical Workers with AT&T and Lucent Technologies. IBEW also has its Enhanced Training Opportunities Program (ETOP) for AT&T manufacturing employees.

In the construction industry, a wide range of skill upgrading needs are met through joint training funds like those created by the Laborers, the Iron Workers, the Sheet Metal Workers, and many other unions in cooperation with their respective national contractor associations.

For sea-going workers, the International Organization of Masters, Mates and Pilots and the Seafarers International Union are two maritime unions that operate training facilities under agreements with their contracted shipping companies.

In the public sector, some of the largest initiatives were created by the American Federation of State, County and Municipal Employees (AFSCME), including programs for city workers in New York and state workers in Illinois and Ohio.

Not to be eclipsed by these massive programs are the scores of smaller programs that unions have mounted at hospitals, nursing homes, hotels, bakeries, and numerous other establishments.

All of these negotiated programs give expression to the shared commitment of the employer and union for continual renewal of job-related skills as well as opportunities for personal growth.

Some unions bargain for education or training as a *fringe benefit*. The cost of the program becomes part of the negotiated fringe benefits package. This was the approach taken by the Food and Beverage Workers Union Local 32, a Washington, D.C., affiliate of the Hotel Employees and Restaurant Employees International Union. Education became part of the benefit package, with monies for education handled by a jointly administered Taft-Hartley trust, along with funds for health insurance and other benefits.

Another approach is the negotiated *apprenticeship and training trust*. Building and construction trades unions have exercised this approach with their contractors for many decades. Apprenticeship programs also operate in the industrial and service sectors. These programs are set up through Taft-Hartley trusts developed jointly by the individual unions and their signatory employers or employer associations. The trust agreement establishes a training fund, and contributions to the fund are determined by collective bargaining.

Other unions obtain education and training through *impact bargaining*, where labor and management discuss ways to lessen the impact of policies that adversely affect the workplace. Under the National Labor Relations Act and many state laws on public sector bargaining, unions cannot compel employers to bargain about the policies themselves—policies to introduce new technology, for example, or to close a facility. But employers *must* negotiate with unions on the impact of those policies on employees.

One union that engaged in successful impact bargaining is the International Union of Electronic Workers (IUE), Local 717, in Warren, Ohio. When the Packard Electric Division of General Motors proposed new high tech production processes designed to increase the plant's competitiveness, IUE negotiated a comprehensive job security and retraining program for workers at the Warren plant. The program, covering both basic education and technical skills, enabled IUE members to move into the high tech work.

Sometimes in impact bargaining, retraining and readjustment services are established for workers who will be displaced by workplace changes. Programs for laid-off union members may later be expanded to serve those who are still on the job. The substantial Auto Workers and Communications Workers training funds began in that fashion (see the previous box, "Negotiated Programs Serve Virtually All Industries"). In 1996, the UAW expanded its joint role with General Motors to include UAW participation in decisions on technical training and new company equipment.

In some cases, education and training may be an issue that you'll bring before a *labor-management committee*. If you

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have a labor-management participation team or something similar, that may be the appropriate place to discuss your members' basic skill needs. Workers at federal government agencies that have established a partnership council can bring up training needs with that joint body.

When your union represents public employees but doesn't have the right to bargain, your discussions with management will have to take place in another forum. Here, too, an existing joint committee may serve your needs. When no joint entity exists, the union-employer relationships that are formed while planning a workplace education program could be the precedent for more effective communication between labor and management.

Workplace changes can arise suddenly, so the usual bargaining cycle of perhaps three years may not bring unions and employers together frequently enough for effective negotiation on new skills and work systems, many unions find. Some supplement their traditional contract with side letters or memoranda of understanding that express both parties' intent to cooperate in solutions (as with the sample letter of intent in Step 1, "Lay the Groundwork"). Unions need to be prepared for what amounts to continuous bargaining on workplace change and related skill and training issues.

Develop Collective Bargaining Language

Before you open discussions with your employer, you should examine your current collective bargaining agreement. Do you have language that requires the employer to discuss training and education needs with the union? Is there language that gives the union influence over how these needs are defined and how they are met? Or is there other language you can build on to expand or establish an education program?

You should also review how education and training have been handled in past negotiations. Who handled the issue for management, and what were their views and priorities related to training?

If your union has any influence in determining who will be present on the employer's side in your negotiations, you may want to involve the employer's human resource development or training specialists. Their work routinely involves training issues, so they sometimes are more aware of the potential benefits of workplace education than, for example, the employer's labor relations experts. If the labor relations staff has the real authority to negotiate an agreement, though, you'll obviously want to work closely with them as well in developing the best contract language.

What to Cover in Your Contract

The broad agreement that you negotiate with management could spell out the following information about the joint education program. More detailed information can be covered in a separate document, such as a joint memorandum of understanding. Of course, the specific language you adopt should address your own circumstances.

- Recognize the need for ongoing learning as a means of fulfilling personal as well as job-related goals.
- State the purpose and goals of the joint program.
- Set up the funding mechanism and specify the funding rate—for example, the contribution per hour or per capita; the minimum annual funding level; the carry-over of any unspent funds at year-end; etc.
- Describe the governing structure, specifying equal roles for the union and employer.
- Provide a procedure for resolving problems—supplementing existing grievance procedures.
- Describe the new program's relation to existing benefits—such as a tuition assistance program.
- Spell out employment security provisions related to the program—for example, offer participation in the program as an alternative to demotion or layoff as a response to workplace changes, and ensure that low test scores won't result in dismissal or pay loss.
- Endorse the principles of worker-centered learning—including voluntary participation, confidentiality of classroom records, and respect for individual learning needs.
- If desired, provide financial incentives for participation—for instance, paid release time or a training stipend.
- Describe any related services to be offered—such as educational counseling or child care.

The language of your joint agreement, tailored to your specific worksite, should support the worker-centered approaches that are so critical to success. Usually the contract language provides very broad authorization for education or training initiatives. It should describe the program's goals as well as spell out the respective roles of labor and management. The bargaining agreement may authorize an education or training trust fund to handle monies and develop policy. A procedure for problem resolution should also be specified.

Your joint agreement must also stipulate how the program will be funded and at what level. Often the funding formula is

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based on the number of hours, weeks, or months worked by covered employees. In other cases, employers make a per-capita contribution. In addition to that funding formula, some contracts specify a minimum annual funding level. It's a good idea to provide for the carry-over of any funds that remain unspent at the end of the year.

Issues that are generally covered in a collective bargaining agreement on education or training appear in the box, "What to Cover in Your Contract."

In addition to the broad language of the collective bargaining agreement, specific features of the program are usually spelled out in supplementary documents that are jointly developed. These may include a joint letter of understanding, program guidelines, program manual, or a trust agreement, for instance.

Establish Dialogue on Anticipated Changes

In a world where workplaces are constantly changing, you and your members want to keep fully informed about anticipated changes and how they may affect members' jobs and job skills. Employers can be slow to acknowledge change; the initiative to act may have to come from the union.

Many unions have found ways of participating with employers to determine and plan change. The union is in a much stronger position if it is involved in negotiating over proposed changes, as opposed to just reacting to

Mutual Benefits of Joint Planning

"A classic case demonstrating the difference between a management program and a cooperative venture was played out in a major Philadelphia hospital," report the Philadelphia Hospital and Health Care Workers, District 1199C, AFSCME, in their manual, *Creating a Union-Management Educational Partnership*.

Unilaterally, the hospital introduced computers into a 25-person unit. After completing the hospital's computer training program, four of the workers were laid off because the hospital deemed their skill levels deficient.

"The union filed a grievance and the case eventually went to arbitration, a long and costly procedure," according to the union. "As a result, the hospital was forced to rehire two of the workers."

Eventually the hospital was ready to computerize its entire operation. This time it came to the union first and proposed a cooperative training program. The union agreed. With help from grant money obtained by the District 1199C Training Fund, the union conducted basic skills training and an introduction to the computer. The hospital provided the computer-specific skills training.

With this cooperative approach to learning, the entire workforce of 800 made a successful changeover to computers. No one had to be laid off.

Collecting Information on Changing Skill Demands

If you haven't already done so, you and your signatory employers may want to establish ongoing dialogue about anticipated changes affecting your members' skill requirements by:

- including specific provisions in collective bargaining agreements to require early planning for workplace changes that will affect jobs or skill levels
- forming a joint committee or task force to identify changes in skill requirements and determine appropriate training
- using an existing labor-management structure (such as a joint committee) to identify changing skill requirements and new training needs

In addition, be alert to these warning signs that workers may lack needed skills:

- increased attrition in jobs where new skills are being demanded
- lack of upward mobility; members not bidding on higher jobs
- increased number of grievances involving changes in the work situation, such as new job duties or denial of promotions
- attempts by management to restructure jobs, for example by combining duties, inserting a new level of positions with higher skill requirements, or creating new job classifications outside the bargaining unit
- attempts by management to establish or revise educational requirements for jobs
- reports from workers themselves that they have difficulty with new job requirements

changes and bargaining only over their impact.

Through your collective bargaining relationships, for example, your union might negotiate channels of communication to keep the union apprised of any management proposals that would affect members' jobs, including proposals for:

- introducing new equipment
- applying new technology
- redesigning production processes
- implementing quality controls
- making control processes more worker-centered
- decentralizing problem-solving to the production level
- introducing work teams
- training workers for broader responsibilities
- adding new products or services

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- eliminating existing products or services
- increasing direct customer contacts
- complying with occupational certification requirements
- meeting new safety and health standards

Information must be freely available so that you can help workers and the employer alike to assess the proposed changes, plan for their implementation, and prepare your members for new skill requirements.

By the same token, you will want to establish channels for the union to communicate recommendations to the employer on changes that your members want. As the American Society for Training and Development advised in *The Learning Enterprise:*

> "[Workers'] hands-on experience with the product and customer contact make them prime experts and the front-line listening posts for new efficiencies, quality improvements, new applications, and innovations."

Some employers resist bargaining over change. But that's a costly mistake. Lack of planning and consultation with the union can force an employer into expensive, last-minute personnel decisions. For example, by failing to prepare for new technology until the last minute, management may feel it's too late for retraining. As a last resort, the employer may attempt to fire experienced workers and hire replacements who already have the desired skills. But what its long-time workers lack in high tech skills, they probably make up for in invaluable and irreplaceable knowledge of the company, understanding of the company's goals and needs, and loyalty to the employer and their fellow workers—not to mention the many occupational skills that will transfer to new work situations.

"A fire-hire policy not only demoralizes the rest of the organization; it often proves to be the more expensive option, once the dollar-and-cents costs of dismissal and replacement are calculated," the Work in America Institute reported in *Training—The Competitive Edge.* Based on company case studies, this Work in America Institute report highlighted the importance of confronting change early. It also recommended that unions be partners in planning for change:

> "The employer should regard union involvement as a plus rather than a minus. . . . Both parties benefit most when the union becomes a full partner in the training enterprise. . . . Management and employees (and their unions) should team up to analyze needs, develop curricula, design training materials, instruct, and evaluate results."

Look at Grants as Seed Money

Government grants can sometimes be valuable resources along with negotiated funds. A grant can serve as seed money to help your joint program get off the ground. Or it might be used to supplement and broaden your program's services. While outside funds don't relieve an employer of its responsibilities for education and training, these funds can be an incentive for additional investments by the employer.

An example of grants being used to leverage other support for education is seen at Local 285 of the Service Employees International Union in Boston. Its joint Worker Education Program has helped SEIU chapters throughout Massachusetts to establish labor-management training committees and implement a wide range of educational programs for workers in the health care industry. Federal and state grants have provided most of WEP's funding, and the project has also drawn on foundation funds and negotiated employer contributions.

The Montana AFL-CIO has tapped federal job training funds to offer basic skills education to laid-off workers. Its statewide program, Project Challenge: Work Again, provides basic skills classes and a variety of reemployment and training services to union members and unrepresented workers who have lost their jobs.

Sources of grant funds are described in Appendix B, "Outside Resources."

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STEP 4 Define Your Union's Role

Operating the program yourself gives your union its best opportunity to integrate this education or training activity into your union's larger plans and programs. If you don't think you can take on this responsibility by yourself, consider sharing responsibility with other unions or with your members' employer.

Give the Program a Union Label

By assuming a key role in operating the learning program, your union can give it a special relevance for your members that's often missing from adult education. Ideally, if resources permit, you'll decide to operate the program yourself. If this isn't practical, an equally effective approach may be to form a consortium with another union or group of unions to share the operational responsibilities. Or your union might form a partnership with an educational institution. In each case, the program should have a clear union identity.

As the AFSCME and Seafarer programs illustrate (see the boxes, "Union-Run Classes for City Workers" and "A Union-Operated Campus"), employers can also see the advantages of having

Union-Run Classes for City Workers

Basic skills constitute one of the largest components of the education program for New York City employees that's run by District Council 37 of the American Federation of State, County and Municipal Employees. With support from collective bargaining agreements with the city of New York, the union has been holding basic skills classes for its members since 1971. Over 3,500 members have obtained their GED through the program.

Funded as a fringe benefit, the program is administered by the union's Education Fund. Budget requirements are reviewed by the District Council 37 Benefits Trust Fund. City management has the right to disapprove proposed courses, although it has never actually exercised that right.

Because the union operates the program, it has been able to tailor services to its members' needs. The teachers are experienced in adult and worker education, and union representatives offer counseling as well. Classes focus on members' interests, both for personal and career development, and they're scheduled and sited to accommodate workers' different shifts.

programs run by the union. Placing the union in the principal operating role should certainly be considered even when programs are financed under collective bargaining agreements.

Look at the Benefits of Being the Operator

Serving as the operator of an education or training program helps your union in a number of ways, whether you do it on your own or in a consortium with other unions.

First, we've seen that education is indeed a bread-and-butter issue for unions. Education and training can help you achieve your broader priorities as a union (see Chapter 2, "Unions' Stake in Workplace Education"), and, in this way, these programs can be as important to you as your more traditional functions, such as handling members' grievances.

Operating a program gives you a chance to integrate education with these other union priorities. You can make it part of a comprehensive union agenda for improving the lives of your members.

Second is the ability to respond swiftly to your members' education and training needs. If your members are suddenly faced with new certification requirements, as an example, you can adapt your program to prepare them for qualifying exams.

Third, union control means more flexibility in program structure and design. You'll be able to tailor the program to your members. If they express personal interest in special classes, such as child development or family economics, you can develop

A Union-Operated Campus

Seafarers have all the advantages of a campus learning environment at the Harry Lundeberg School of Seamanship operated by the Seafarers International Union (SIU) at Piney Point, Maryland. Basic skills are part of the wide-ranging curriculum taught there under a nationally negotiated agreement between the SIU and maritime industry employers. Founded in 1953, the residential school offers entry, upgrade, and academic courses to help SIU members keep abreast of needs in the industry as well as meet personal learning goals.

A joint labor-management board oversees the school. Funding is contributed on the basis of weeks worked by Seafarers under the national collective bargaining agreement. The union staffs and teaches the program.

More than 1,000 Seafarers attend this premier instructional facility each year, taking a variety of classes or individual computerized instruction. They can earn job certification as well as a two-year college degree. The roster of basic skills courses includes reading skills, adult basic education, General Educational Development (GED), and English as a second language.

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An Educational Consortium of Unions

The value of unions uniting for common goals can be seen in the success of the Consortium for Worker Education (CWE), a nonprofit organization in New York City which serves over 20,000 workers and family members a year. More than two dozen unions participate.

CWE has attracted wide recognition for its contributions to lifelong learning, including an award from the U.S. Department of Education as one of the country's outstanding adult education and literacy programs.

The Consortium's staff oversees a mix of programs to meet educational and career development needs. These include English as a second language, basic skills, GED and college preparation, training for licensing and certification, and custom-designed workplace education, among others. CWE obtains funding primarily from state or city grants, and classes are held at union halls, schools, and workplaces throughout the city.

The unions active in CWE represent workers across virtually all sectors of the city's economy. They include Teamsters Joint Council 16, the Union of Needletrades, Industrial, and Technical Employees (UNITE), Service Employees International Union 1199, New York Hotel-Motel Trades Council, AFSCME District Council 1707, UAW Region 9A, the Greater New York Building and Construction Trades Council, and others.

courses on those subjects. You'll have freedom to design a worker-oriented curriculum, select the instructors, and establish any supportive services your members may need.

A fourth advantage is that when the program is run by the learners' own organization, their union, they take ownership of it. It becomes *their* program. The skills and knowledge they gain from it will symbolize what workers can do together through their union.

Fifth, a union-run education program helps build the capacity of your union. It is an opportunity to get more rank and file members involved in union activities and to develop their future leadership abilities.

Running a program, of course, places responsibilities on your union. Even when you decide to purchase some program services from schools or educational consultants and vendors, the union as program operator still bears ultimate responsibility. The union needs to be prepared to handle the administrative duties that go with the program. That includes overseeing the program's financial integrity. Recipients of government grants may be subject to an organization-wide audit, so some unions have established separate nonprofit organizations to administer their education programs. Of course that separate entity must be soundly managed too.

Principles of Worker-Directed Training

Worker participation is at the heart of the Institute for Career Development, established by the United Steelworkers of America through its collective bargaining agreements with Bethlehem, U.S. Steel, National, LTV, Inland, and many other major steel companies.

With guidance from a national governing board, which is half union and half management, this program operates by "bottom-up" planning. Local Joint Committees at each steel mill take the lead in carrying out the program.

Through the Local Joint Committees, Steelworkers at each site actively select courses, hire instructors, and determine when and where classes will be held. By matching courses to workers' interests, the program has drawn as many as one-third of eligible workers into its classes in a single year.

That high participation rate affirms the value of the worker-directed philosophy on which ICD was founded—as stated in the collective bargaining language that established the program:

> "...Workers must play a significant role in the design and development of their jobs, their training and education and their working environment.
>
> "Experience has shown that worker growth and development are stunted when programs are mandated from above but flourish in an atmosphere of voluntary participation in self-designed and self-directed training and education. These shared beliefs shall be the guiding principles [of the program]."

One of the best ways to find out about what is involved in managing a program is to talk with unions, central bodies, or state federations that have done it.

Consider a Shared Operating Role

If your program can't be solely union-operated, consider sharing an operating role with management as an alternative. Some of the largest and most well-received worker education and training programs are run jointly in this way. Under many negotiated agreements, the company and union have created a nonprofit training organization, answerable to both sides, to carry out the program.

This kind of partnership can only work when the union and management have developed a basis for cooperation. That doesn't mean that labor or management must give up their respective advocacy roles. What it does mean is that they recognize shared goals—even when they don't share *every* goal—and have negotiated a way to work toward them together.

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Jointly operated programs can even offer potential benefits to unions. Primarily, you'll gain a new opportunity to involve the employer in joint planning for future skill requirements. By entering into joint discussions on workplace needs, you may learn more about the employer's long-term plans which, in turn, will help you anticipate your members' future needs.

Your joint planning relationship may also enable you to open discussions with the employer on the long-term plan itself. Working with management, you may develop a basis for the union to make its own recommendations on those plans, and together to arrive at mutually acceptable decisions on the future work environment.

On the negative side, confidentiality of classroom records may be more difficult to protect when the employer helps run the program. You'll want to be especially careful in establishing strict guarantees that records will stay in the classroom, away from the workplace and personnel files.

Define Your Governing Structure

To operate the program effectively—whether on your own or jointly—you'll need to establish a governing structure

A Network of Training Centers and Local Committees

Under the national agreement between the United Auto Workers (UAW) and DaimlerChrysler, a separate entity, known as the National Training Center, administers the education and training programs negotiated under a memorandum of understanding on joint activities. The Detroit-based Center is staffed equally from the company and union. Its co-directors are designated respectively by labor and management.

Through the National Training Center and satellite Training Centers around the country, the UAW and DaimlerChrysler develop and implement a wide variety of programs for company workers and their families. The national Center provides guidance to plant-level Local Joint Training Committees and assists them in establishing programs. It also operates national demonstration programs.

Planning and oversight of local programs are the responsibility of the Local Joint Training Committees. Typical programs offer basic academic skills, high school equivalency, English as a second language, computers, and other job-related or personal skills.

The National Training Center acts as administrative agent for the UAW-DaimlerChrysler Joint Activities Board. A joint memorandum of understanding makes that Board responsible for all joint labor-management endeavors at the company.

The UAW has established similar joint training program structures with General Motors, Ford Motor Company, and other employers.

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that's in touch with what your members need. If you share responsibility with the employer, we have urged you to take on an equal role in the decision-making process so that you can represent your members' interests. For instance, on the joint governing board, the union should serve at least in a co-chair capacity and appoint at least half of the board's members.

At the operating level, a joint program should be overseen by co-directors from both labor and management. Alternatively, you might engage a professional administrator who is jointly selected and accountable to both parties.

Regardless of who operates the program, you need to consider how you can encourage a worker-centered decision-making process to ensure that the program remains responsive to your members. A learning program cannot be imposed arbitrarily by "top-down" management; it must be firmly grounded in the actual needs of your members. A challenge to the program's governing body will be to facilitate this participatory planning process.

A Joint Structure to Promote Advanced Training

The Wisconsin State AFL-CIO has worked to develop an infrastructure that supports unions' proactive approach to new skills and advanced work systems. Particularly important, the Wisconsin labor body sought a way for unions to access information about their employers' future plans and participate equally in decision-making on these issues. Their approach: An industry consortium in which labor and management join with peers in their region to discuss workforce training and other mutual concerns.

As a prototype consortium, the state body helped found the Wisconsin Regional Training Partnership in 1992. WRTP's goal is to upgrade workers' skills—including basic skills—and expand employment in the high wage, high performance enterprises that are seen as critical to the region's economic base.

Led by the secretary-treasurer of the State AFL-CIO and the chair of the Governor's Commission on a Quality Workforce, WRTP is having success as a forum for the joint development of human resource policies. Its business, labor, and public sector members work together on issues such as skill standards, industry benchmarking, and career paths.

At the plant level, WRTP encourages unions and employers to form joint committees and develop their own workplace education centers. By encouraging training of current workers, WRTP hopes to improve the job security and mobility of Wisconsin's experienced workers while opening up entry jobs for young people, welfare recipients, and other unemployed adults.

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STEP 5 Develop Links with the Education Community

Your workplace learning program can create new connections between education providers and your members. To help members get the most from those connections, you will have to "educate the educators" about your members' needs. Whether your program hires its own instructors or contracts with schools to run classes, the union should take the lead in designing the kinds of services your members want.

Explore Local Educational Resources

To teach your classes, your union may want to consider two options:

- hire your own teachers
- contract with educational institutions to furnish teachers approved by the union

Either way, your union has a chance to establish new relationships between your members and local education providers. Those relationships can increase workers' access to education and training services. They can also make the education agencies better informed about your members' needs.

Explore your area's education resources:

- public and private post-secondary institutions, including two-year and four-year colleges and universities
- vocational-technical institutions operated under the state education system
- the adult basic education program run by the public schools
- high school credentialing programs that provide high school equivalency diplomas in cooperation with the public schools
- "nontraditional" providers of adult education and training, such as community-based organizations or job training agencies

Undoubtedly, many of these schools and agencies are ones you've worked with before, either in earlier educational programs for your members or in other community activities. Your union can build on these relationships in exploring new linkages to support a basic skills program as well as broader educational efforts.

Look for instructors who aren't bound by traditional school-based approaches to adult education. They should be comfortable with a teaching approach that focuses on working adults. They

must be flexible in adapting instruction to a range of adult learning styles. Above all, they must be sensitive to your union's needs and objectives. They should be willing to spend some time getting to know the union by visiting union meetings and your members' workplaces.

Some unions have found public higher education institutions to be especially responsive in tailoring classes for union members. A union-based program can be a natural extension of their own educational mission to serve adults in the community.

When you hire an educational institution, you'll also want to keep in mind the provisions of any collective bargaining agreements that are in effect at the school.

Make Your Union's Needs Clear

Although you enlist the schools' assistance in designing and teaching your program, the union should lead and direct it. You will need to tell educators clearly what you and your members want from them. If you don't, learners may be quickly turned off by more traditional classroom approaches. Since you're paying for it, work with the school or agency to custom-design the kind of program *you* want—one that meets your members' needs. You also have the right to shop around until you find what you're looking for.

As the purchaser of educational services, you have an obligation to review the school's performance in carrying out the program. If you and your members are not satisfied, the school must work with you to correct the problems. Find a different service provider if the school can't give you what your members need.

Make the Union Visible to Members

There are a variety of ways to make a union presence evident throughout the program. Union officers or staff can welcome learners at the opening of the program as well as speak at graduation. Union representatives can serve as counselors, "learning advocates," or teacher assistants (volunteer or paid) and visit classes regularly to assist workers with questions or problems. Those union representatives can conduct special group discussions on study skills or arrange for members to help each other in study groups. Qualified union staff or union members may be able to conduct some of the classes. Finally, the union can sponsor a graduation ceremony and award certificates to participants at the end of the program. These activities reinforce the program's identity with the union and its accountability to the workers themselves.

By getting more involved in education in your area, you can help local educational institutions become more responsive to your members' needs. You'll also have an opportunity to make them more aware of the labor movement's educational goals. One way to do this is to serve on the boards of community colleges or other higher education institutions in your area. You

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might also encourage local colleges or universities to establish a labor advisory board, as was done at the City University of New York, with members from labor and the university, to advise on workers' needs. A labor advisory committee will enable the school to give a worker-centered focus to any of its programs that are geared to employed adults.

Select Responsive Instructors

Some unions actively interview and select instructors. Others leave that function to the cooperating educational institution but retain the right to make the final selection. You have the right to evaluate instructors to make sure they meet your criteria for worker-centered learning. Sit in on classes, and get feedback from workers taking the classes.

Instructors at the traditional adult basic education institutions—the public schools and community colleges—may not be very experienced with workplace-based education. You should seek out those who are willing to try something new, to work with your union to develop the kind of

Criteria for Choosing Instructors

These questions can help you identify instructors whose teaching approach supports your union's objective of a worker-centered classroom. It is hard to find instructors who meet all the criteria, but teacher training may help you fill some gaps in their experience.

- Is the instructor experienced in teaching basic skills to adults?
- Does he/she have experience with a nontraditional approach to adult education—using teaching materials and curricula that relate to the adult's world?
- Is he/she a union member? How knowledgeable is he/she about unions?
- Is he/she sensitive to workers' needs and concerns as learners?
- Does he/she understand how to build on the knowledge and skills workers use in their jobs and in their personal lives?
- Is he/she comfortable using a variety of teaching approaches to meet the different learning styles of different individuals?
- How well does he/she know the industry and jobs in which your members work?
- Is he/she aware of and sensitive to cultural differences that may exist among your members?
- Is he/she flexible and willing to cooperate with the union in shaping the curriculum?
- Will he/she approach learners as equals in a collaborative learning process?
- Has he/she actually taught in a non-school setting, such as a union hall or a workplace?

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Benefits of the GED

Each year, about half a million U.S. adults earn General Educational Development diplomas, or GEDs, accounting for one out of every seven high school diplomas issued in this country. Armed with their GED, adults enjoy an advantage over high school dropouts in the workplace, the GED Testing Service reports.

GED graduates earn substantially higher wages, on average, than high school dropouts. They are more likely to work full-time, and their wages grow more quickly. They are also more likely to receive additional training after gaining their GED.

instruction you want—especially teachers who are union members themselves. The teachers you choose should also be sympathetic to the program's broader goals, such as educating workers in the areas of family and civic responsibilities. Don't overlook teachers who have backgrounds at community-based organizations such as job training agencies, where they have had experience with non-school-based adult education. (See the box on the previous page, "Criteria for Choosing Instructors.")

Since few colleges and universities have specialized in preparing teachers to work with adult learners, you may have difficulty identifying educators who have all the attributes you're seeking. That's why many unions decide to do teacher training. Educators at the Workplace Academy, who participated in UAW-Ford's worker education services, cited three kinds of training that instructors should get:

- discussions with learners before starting the program, to hear their expectations
- orientation to the work situation, including plant culture and labor history
- in-service training on learner-centered instructional techniques as well as specific content areas

Unions sometimes recruit volunteer tutors, perhaps union officers or members, to supplement the professional teaching staff. Local organizations affiliated with national volunteer groups, such as Literacy Volunteers of America or Laubach Literacy Action, can advise you on training volunteers.

Enlist Members As Peer Advisors

You may want to train union members as mentors or "learning advocates." These peer advisors can be very effective in making instructors more aware of workers' needs.

In some union education programs, mentors or advocates are elected by their classmates; in other cases, they are volunteers. Their roles can include orienting new learners, helping look into attendance problems, and working with teachers to plan topics for class discussion. Learning advocates are

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highly effective in recruiting new participants (as discussed in Step 8, "Encourage Your Members to Participate"). They also can be valuable in offering encouragement to learners and providing feedback to the union on the program's effectiveness.

Offer High School Credentials

Some of your members may be among the 45 million American adults who lost out on the chance for a high school diploma. Working with your local school board, your union can establish a high school equivalency program for your members.

Many unions have successfully prepared their members for the GED (General Educational Development) exam, which is the traditional route to a high school equivalency diploma. (See the box on "Benefits of the GED.") A newer option, the External Diploma Program or EDP, is attractive to union members because it gives credit for what adults have learned in their working lives. (See the box, "A New 'External Diploma' Credential.") Some unions consider the EDP more appealing to members because it does not require standardized, timed tests.

A New "External Diploma" Credential

The United Auto Workers (UAW) was one of the first unions to recognize the value of the External Diploma Program (EDP) as a high school equivalency credential. In 1992 it brought the EDP to workers at the General Motors plant in Janesville, Wisconsin, through the joint UAW-GM education center there.

Instead of holding structured classes and tests, the EDP requires adults to carry out practical, self-paced projects. The projects demonstrate their achievement of specific competencies in areas such as writing and math, communication and problem-solving, consumer awareness and money management.

The UAW and GM constituted two sides of the triangle that initiated the Janesville EDP program. The third side was a local technical college. In order to be recognized by the American Council on Education, where the EDP standards were developed, a local educational facility must be part of any EDP.

At first, the UAW site administrator had to do some persuading to win over the more traditional educators at the technical college. They were skeptical about supervising a high school diploma program where people spent little or no time "sitting in a classroom." But their doubts subsided when they learned about EDP's successes elsewhere. Since then, a number of UAW members and their spouses have received their high school equivalency diplomas.

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STEP 6 Outline a Plan of Services

The specific services that your program offers should reflect the needs, priorities, and resources you've identified, as well as the roles that your union and others, such as schools and employers, have chosen. Taking these needs, priorities, resources, and roles into account, you should develop a plan indicating what the program will do, how it will do it, and what it will cost.

State Your Program's Goals

Assuming you've followed the other steps, you've already identified your members' needs. You've put wheels in motion on funding negotiations, and you've begun to work out cooperative roles with management and the education community. Now you must plan specifics.

As a first step, you should have a clear statement of your program goals. This statement of goals, or mission statement, serves as a framework for the program and clarifies what you expect from it.

The mission statement will guide you in your planning. It can also be helpful when you explain the program to your members (as discussed in Step 8, "Encourage Your Members to Participate").

If you've reached agreement with a signatory employer through contract language or a separate letter of intent (as in Step 1, "Lay the Groundwork"), these may provide a good statement of your goals.

Translate Your Goals into a Program

Getting even more specific, now you should take your general statement of goals and flesh it out with a plan of specific services for accomplishing those goals. The plan of services should show what education and training you'll provide and how those services will be carried out: with what staff, instructors, and other resources.

To further develop your plan, you'll need to make basic decisions on education and training issues. What classes will you offer? Who will teach the classes? Where will they meet? How will participants get the supportive services they need? How many workers can you initially serve (and if not everyone, how will you set priorities)? How much will all this cost? How will you evaluate the results?

One Union's Mission Statement

Every union should set its own goals and objectives, appropriate to its members' needs. Here we show how the Bricklayers and Allied Craftworkers (BAC) Education Program stated its mission.

The BAC Education Program is built on the premise that the BAC member is at one and the same time both the reason for which the union exists and the union's most important resource.

The mission of the BAC Education Program is to help BAC members and their families gain a greater understanding of the world in which we live and how it affects us as working people.

The general objective of the BAC Education Program is to help the union grow stronger and more capable. The program's specific objectives are to:

- ☐ **enhance** union leadership capabilities through skill building and learning;
- ☐ **improve** communication among the leadership and rank and file members about the union;
- ☐ **foster** an understanding of labor's role in society and the economy;
- ☐ **encourage** brotherhood and sisterhood in the union;
- ☐ **reinforce** membership pride in craft and appreciation of excellence in construction design and workmanship;
- ☐ **stimulate** awareness of education as a lifelong process; and
- ☐ **support** organizing and the growth of the union.

You also need to make decisions about the program's administrative and management structure. Who will run the program? How will staff be selected? Who will oversee the program and make sure it is accountable to the union and its members?

Talking to other unions that have run basic skills programs can help you define your own plans. Also helpful will be some of the general publications on planning or administering adult education programs, since they cover typical planning issues that are outside our focus here. (A number of these publications are listed and described in Appendix C, "Useful Reading.")

Decide What Services You'll Provide

Here are some questions to help you decide how to structure the program.

- What kinds of services will help you accomplish your stated objectives?

  Plan what types of education and training activities you'll offer, as well as appropriate support services, such as educational counseling, social service referrals, and the like.

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- What subject areas will classes cover?

  Remember, your goal will be to tailor course offerings to your members' identified needs and interests. Further, the curriculum for each course should be appropriate for adult learners (as discussed in Step 7, "Design the Worker-Centered Classroom").

- What related activities will your program address?

  Education and training may be just part of the answer. For example, labor and management could review the written materials used in the workplace to see if they need to be made more clear and readable. Your program creates an opportunity to deal with those issues.

- How many workers can you initially serve?

  Often it's impractical to try to serve all interested workers at once. Not only do limited resources make enrollment limits unavoidable, but it's important to keep classes to a manageable size. In these circumstances, you should strive to make sure your members understand that no one will be left out. Your plan of services should include a timetable for their participation, so they'll know everyone can make use of the program eventually. (See Step 8, "Encourage Your Members to Participate.")

Competitive Skills for Three Building Trades

To help building trades workers stay competitive for work in technologically changing fields, the Ohio State Building and Construction Trades Council joined with the Center on Education and Training for Employment at Ohio State University to conduct an upskilling program.

Through the Council's Training Foundation, three unions were chosen to participate in the program due to the changing skill demands on their members: the Sheet Metal Workers, International Brotherhood of Electrical Workers, and Carpenters.

Workers and teachers jointly set the project's learning goals. Math and reading skills were important to members of all three unions. In addition, their classes emphasized critical thinking and "learning how to learn"—skills that would help workers keep pace as technologies continued to change in the future. Teachers made heavy use of role-playing, where workers analyzed how to solve job-related problems. This process introduced the workers to the "Plan, Do, Check, Act" cycle advocated by quality management adviser Edwards Deming.

Skills for an Empowered Voice in the Workplace

Today many unions are negotiating for their members to have a greater voice in workplace decision-making. For these participatory work systems, members need more than ever to understand collective action and group problem-solving. Unions are using workplace education programs to prepare their members for the new power relationships found in these restructured workplaces.

Classes offered by Baltimore's Labor Education Achievement Program (LEAP), for example, have enabled union members from many companies to hone new teamwork skills. These skills include not only communications and problem-solving, but problem-posing as well, to empower workers to define workplace problems from their own perspective rather than management's. Developed through a partnership of educators, employers, and the Metropolitan Baltimore Council of AFL-CIO Unions, the LEAP curriculum cultivates the higher-order thinking skills that benefit workers on the job, in their unions, and in their communities.

In Chicago, clothing and textile workers from more than a dozen worksites have studied team-building, conflict resolution, and ESL (English as a second language) communications through the joint education program created by UNITE's Chicago and Central States Board. Those skills are seen as helping members of the union raise a proactive voice in their workplaces.

- How will you balance the needs of different segments of the membership?

  Different groups of members are likely to have distinct needs; perhaps English as a second language for one segment, and brush-up reading skills for another. It's especially important to develop balanced programs that have something to offer to all segments of your membership. See the section called "Balance Your Members' Competing Needs" in Step 8, "Encourage Your Members to Participate."

- When and where will classes be held?

  The best location is one that's accessible to workers at the times they're free to participate. Your union hall is often the ideal site. Some unions—such as the Union of Needletrades, Industrial and Textile Employees (UNITE) in New York and Chicago—like to hold classes at the jobsite to make them as convenient as possible for their members. AFSCME District Council 37 gives workers a choice of locations, recognizing that some learners prefer the convenience

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of the jobsite while others prefer the union hall where they have privacy from supervisors and their immediate co-workers.

- How will you involve learners in decisions about their education?

  You'll want each learner to develop his or her own learning plan, with assistance from counselors or instructors. The individual learning plan will give your members a chance to define their personal goals and map out how to achieve them. The plan can help you place workers in the most suitable education and training activities.

List Your Desired Outcomes

What results do you want to see from the program? These should be outcomes that fulfill the goals or mission that you have set out to accomplish (as described at the beginning of this step).

Broadly, you'll need to set targets for how many people will participate, how long they'll be enrolled, and how many people will complete specified courses or hours of instruction. You may express some of your desired outcomes as measurable educational gains, such as increased competencies in reading, math, or consumer skills. One outcome may be the number of people who meet the goals they establish in their individual learning plans.

You can also aim for more subjective outcomes, such as increased self-esteem and increased confidence in using basic skills in real-life situations. Increased networking among learners can be another kind of outcome.

Design your curriculum to help achieve the results you're seeking. For example, a series of incremental learning steps can build up to each desired educational outcome.

You'll also want to consider how the union will obtain the information it needs to evaluate results (as discussed in Step 9, "Keep Your Program on Track").

Draw Up Operational Plans

How will the program be administered? What staff are needed to run the program? Will staff be employed by the union, or will you create a separate nonprofit entity to carry out the program? Again, talking with experienced unions can help you develop your program's operational plans.

All program staff must be sensitive to workers and their needs. Your union can play an important role in recruiting and training staff. Everyone employed by the program should get special orientation on the particular needs of your members. An advantage of tapping your union's membership for staff and instructors is that they are likely to be familiar with these needs already.

What should you look for in a program director? You'll probably want someone who knows the labor movement and the industry in which your members work. Many unions have found that a teaching background is ideal but not absolutely essential; more important is an understanding of what the union and its members seek to achieve through an education program.

The director should also be someone who has the confidence of the workers to be served. For this reason, it may be appropriate for the union to select the staff director for a joint labor-management program. At a minimum, the selection should be a joint decision. Some jointly operated programs solve this with co-directors.

Crucial to protecting the integrity of your program will be sound financial management and recordkeeping practices. It's also important to be fully familiar with the rules and regulations for any federal or state funds used by the program, in order to avoid having to pay back funds that were improperly spent.

Part of your operational planning is making a budget. Your budget plan should show all the costs you expect to incur as well as the projected timeframe for each phase of the program. Following the budget will help you ensure accountability for the program's funds.

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STEP 7 Design the Worker-Centered Classroom

Your union-designed classroom may bear little resemblance to the typical adult education classroom. Instead, classes can be made to order for your members. Your instructors should actively involve workers in directing their own education, offer them varied approaches to learning, and respect their individual differences. Workers often make their greatest gains when they learn basic skills in a real-life context—that is, when they can see how skills are used in their own life situations, both on and off the job.

Shape the Classroom to Your Members' Needs

To foster a positive classroom environment, your goal should be a classroom that's customized to meet your members' distinct needs. Who better to take the lead in designing such a classroom than the union itself?

Your union knows its members, the work they do, and their concerns both on and off the job. While you may hire experienced instructors or purchase educational services from the schools (as discussed in Step 5, "Develop Links with the Education Community"), it's your program, and you have not only the right but the responsibility to make it work. You should work closely with the educators to make sure they clearly understand your members' educational interests and goals.

Think about the way you work with your union's lawyer or accountant. They, like the educators, can advise you. But the union must still make final decisions based on your knowledge of your members' situation.

Your union may want to develop its own instructional plans and, in some cases, put together its own curriculum materials. You may also need to train the instructors to help them understand your members, their jobs, and their educational goals (as described in Step 5, "Develop Links with the Education Community").

When your program's objective is to help your members earn academic credit or job certification credentials, you'll need to work with educational institutions, industry certification boards, or curriculum advisors from your local American Federation of Teachers to ensure that the courses you design meet the established standards.

A Comparison

Participatory Learning	Passive Learning
■ learn by understanding	■ learn by repetition
■ discuss ideas	■ memorize facts
■ help develop learning plan	■ follow pre-set curriculum
■ develop self-awareness	■ accept classroom rules
■ examine social issues	■ accept status quo

Help Workers Take Control of Learning

We prefer to think of the classroom as a place of *learning* rather than *training*. Learning implies an active role for the student, while training implies a passive one. Why that difference is significant was aptly stated by employment experts at the Work in America Institute, in their book, *Training—The Competitive Edge:*

> "The shift from 'training' to 'learning' is more than semantic. Training puts the emphasis on what someone does to the employees. . . . Learning implies that employees actively participate in expanding their own skills."

But regardless of whether you call it learning, training, or education, the active participation of learners should be central to your union's basic skills program. Research supports the view that when adults are in control of their learning, they learn more effectively. Their participation also promotes the growth of personal awareness and social skills that help them function more effectively in a variety of settings, individually and collectively. Participatory learning fosters self-esteem and empowers adults to take greater responsibility for their lives. This is the kind of learning that a worker-centered program seeks to encourage.

Levels of Learner Participation

Level 4: Learners have greater deg ees of control, responsibility, and reward for program activities.

Level 3: Learners are consulted for some input into the instructional and management process.

Level 2: Learners cooperate with the rules, activities, and procedures developed by program staff.

Level 1: Learners are present in the program.

(Adapted from Paul Jurmo in *Participatory Literacy Education*, 1989.)

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Courses Can Build to Higher Educational Goals

Basic skills classes have been a stepping stone to further education and better jobs for many textile and garment workers in New York City. With their large immigrant membership, the industry's unions—now the Union of Needletrades, Industrial, and Textile Employees (UNITE)—have offered English and citizenship education since the early 1900s. In more recent years, the unions have tapped a combination of negotiated funds and federal and state grants to offer workers a progression of learning opportunities.

Workers have been able to meet a series of educational goals through the learning program established in 1976. They could start with basic literacy or English as a second language classes and continue toward a high school equivalency (GED). Some have gone on to higher education with help from the scholarship fund that was negotiated through the union's multi-employer contract. One woman, for example, started in the literacy program, earned her GED, and went into a nursing program where she received a nursing degree.

Develop Individual Learning Plans

Your members' participation in planning their education begins with the design of the program itself. They voice their needs and interests through the needs assessment process, and through their union, they have an opportunity to participate in developing and operating a program to fulfill those needs.

One of the most important ways you can help your members take responsibility for their education is through their individual learning plans. The individual plan is something learners should develop jointly with their instructors or counselors when they enter your program. It will briefly outline the worker's own learning goals and show how he or she proposes to achieve them.

The learning plan can be the basis for services the worker receives from your program. The plan may also address auxiliary needs: supportive services, occupational skills training, a high school equivalency diploma, and the like. Recognizing that learning continues throughout adulthood, the plan can help your members set immediate as well as longer-term goals. It can assist them in formulating plans for further education in the future, for example, at a local community college or technical school.

Each individual's plan should contain interim goals for measuring progress during the course of the program. Your members' instructors or educational counselors can use those goals to help learners diagnose problem areas and to recognize their accomplishments as they master new skills.

Teaching Percentages in a Real-Life Context

Here are examples of how math problems can be understood in different settings.

Job Context

The directions on a bottle of cleaning liquid tell you to mix the liquid in a 20% solution with water (20% cleaning liquid and the rest water). If your bucket holds five gallons, how much cleaning liquid should you measure into it? How much water?

- *Classroom materials:* Directions on label from cleaning product, bucket, measuring cup, liquid

Union Context

Mary's base pay is now $400 a week. Her union has asked for a 5% general wage increase, and management has made a counteroffer of 3%. How would the two different proposals affect her weekly wage?

- *Classroom materials:* Paycheck stubs, bargaining agreement

Consumer Context

The local clothing store is advertising a 20% discount on men's shirts. How much will you save on a shirt that's regularly priced at $20.00? What is the sale price of the shirt? If the store announces an additional 10% off the sale price, how much would you pay for the shirt?

- *Classroom materials:* Newspaper ads

Citizenship Context

In the last election, the bond issue for building a new school was approved by a narrow margin, with 51% of the voters for and 49% against. A total of 12,500 votes were cast. How many people voted in favor of the school construction? What would the outcome have been if 4% of these "yes" voters had stayed home?

- *Classroom materials:* Newspaper articles on the school bond issue and voting results

Home and Family Context

A recipe for 48 cookies calls for 2 cups of flour. But you only want to make 36 cookies. What percentage of the original recipe will you make? How much flour will you need for 36 cookies?

- *Classroom materials:* Cookie recipe, measuring cup, flour

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You should treat the plan as a living document that learners can revise and update as their needs change and goals are met.

Teach for the Way Adults Learn

Because many adults are motivated to improve their basic skills in order to solve problems and complete tasks, they learn those skills best when they are taught in the context of their own lives or jobs. They get more out of what they learn when they can use their new skills immediately in the real world. If they learn in this way, they not only learn more, they retain it longer.

Teaching that integrates basic educational skills with life skills is sometimes known as "contextual" instruction. (For some examples, see the box on "Teaching Percentages in a Real-Life Context" on the opposite page.) Researchers claim that for people who have "mid-level" reading skills, the approach can be more effective than traditional adult education as a way to learn new skills.

What you should avoid, though, are education programs that are narrowly constructed just for specific jobs. Such a

Interactive Classrooms That Support Learning

A worker-centered program strives for a highly interactive classroom that empowers learners and builds group unity. Learners' interaction with each other is widely seen as an effective component of adult education because it encourages individuals to take control of their education and to mutually support their fellow learners. Interaction in the classroom also builds the skills for active participation in the union and community.

Group discussions, role playing, and strategic planning are activities unions often use to foster these classroom dynamics. Instructors don't lecture; they lead a dialogue.

The curriculum for workplace ESL (English as a second language) at El Paso Community College is one that relies on group interaction. The community college got curriculum ideas from UNITE members at Levi Strauss, from workers participating in the local AFL-CIO's Rio Grande Workers Alliance, and others. One classroom lesson, for example, dealt with workplace rumors, which workers identified as a frequent problem at companies that were introducing new work processes. Workers wrote role-playing scripts that depicted what they might do if misinformation threatened to disrupt their workplace. They acted out their scripts before a videotape camera, and the class analyzed the effectiveness of each approach.

Activities like these can improve language and communication skills, teach new ways to interact with co-workers and supervisors, and develop workers' critical-thinking skills.

Sources of Teaching Materials

The environment of workers' everyday lives supplies a wide variety of practical teaching materials. These materials build on workers' prior knowledge and provide a context for new reading and computational skills.

Workplace

- Employee manuals
- Equipment operating instructions
- Health insurance handbooks
- Safety notices
- Inventory sheets
- Quality control forms
- Price lists
- Memos posted at the worksite
- Job application forms
- Job descriptions
- Paycheck stubs

Union

- Union constitution
- Union contract
- Union news publications

Consumer Economics

- Ads for groceries, cars, bank loans, other consumer items
- Union Privilege benefits (credit card, mortgage program, etc.)
- Income tax forms
- Insurance forms
- Leases
- Medicaid application forms
- Utility or phone company bills
- Warranties

Citizenship

- Ballots
- Newspaper and magazine articles
- Voter registration forms
- Issue papers from the union

Home and Family

- Children's homework and notes from school
- Children's bedtime stories
- Menus
- Recipes
- Telephone books
- Bus schedules

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program clearly fails to broaden your members' skills beyond the specific requirements of that job and limits learners to immediate and short-term goals.

Teaching new skills in the context of your members' lives and jobs means your curriculum must build on what your members know. We've paraphrased guidelines suggested by the Work in America Institute to show how you can put learning in a context that's relevant to your members' lives:

1. Help your members understand what they are to learn and why.
2. Build on the skills and knowledge they already possess (basic academic skills, job skills, and life skills).
3. Develop new lessons that build on lessons they have already learned.
4. Integrate basic skills instruction into technical training or broader academic education.
5. Set learning objectives that relate to workers' jobs and lives.
6. Structure classes as an active dialogue among learners and teachers; avoid lecturing.
7. Incorporate tasks, materials, and procedures that workers actually use into the course wherever feasible.

Get Workers' Ideas on the Curriculum

Workers can contribute a great deal to planning the curriculum. Your instructors need to visit the worksite to confer with experienced workers and to learn more about their jobs. They should listen to workers describe their learning goals.

A basic skills curriculum may be built around practical problems that interest adult workers and provoke discussion, such as:

- ☐ **applying** for a job
- ☐ **getting** to work

Making Basic Skills Part of the Curriculum

Basic skills can be incorporated into many kinds of classes, unions have found. Computer classes, for instance, are one of the most popular settings for teaching reading and writing skills. When members take classes on home repairs, as another example, it's a chance for them to brush up on the basic skills used in measuring, following written instructions, reading blueprints, calculating angles, and other repair activities.

Workplace safety and health classes provide a different opportunity to meet members' basic skill needs. A trainer's guide by the Labor Occupational Health Program at the University of California, Berkeley, offers ideas on conducting health and safety training for workers at different literacy levels.

- ☐ **finding** child care
- ☐ **solving** problems that come up at work
- ☐ **learning** to use new equipment on the job
- ☐ **understanding** the benefits of union membership
- ☐ **following** current events in the community

The curriculum may also devote time to specific job-related skills, such as preparing for a qualifying exam or handling high-tech equipment.

Workers can furnish the instructors with copies of the actual written materials they use in their jobs, as well as materials used in higher-level jobs for which they hope to qualify. They can also show instructors other kinds of work-related materials they use—their union contract, their employee benefits manual, safety instructions, and the like. These make excellent classroom materials for a basic skills curriculum. (See the earlier box, "Sources of Teaching Materials.")

Supervisors who know your members can be an additional source of curriculum ideas, especially when you're planning to cover the basic skills or technical skills used on the job. The employer's training staff may be a source of teaching materials that are specific to the occupations and skills in your industry.

You can develop a basic skills-curriculum plan and instructional materials by combining the information and materials gathered through these discussions with what you found out earlier from your needs assessment and the employer training inventory (described in Step 2, "Identify Your Members' Needs and Goals").

Whenever possible, test any newly designed curriculum with a limited number of learners before it's put into general use. As it's used, you should review and assess it continuously and change it as appropriate to meet learners' needs.

Consider Using Learning Technologies

Learning technologies offer a growing realm of educational opportunities for your members. As with any instructional materials, they can be useful when they support workers' learning objectives. But you need to be selective. Talking with unions that have some experience with learning technologies may help you decide if they should be part of your program—and if so, which ones to use.

Technology is no substitute for a good teacher. But the right learning technologies can help good teachers work more effectively with adult learners—even when the learners are scattered at different learning centers.

Computer-based educational software, for example, can be valuable in a large class where individuals have many different levels of skills. It allows learners to study at their own pace and gives them quick feedback on errors so they can seek further help. Many

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Preparing for Occupational Tests

Local 237 of the International Brotherhood of Teamsters in New York is among the unions that have offered their members preparatory courses for civil service tests or occupational certification exams. Teamster trainees know that when they complete the program they will be prepared to take a test to qualify for jobs at higher wages—such as elevator mechanics, building superintendents, exterminators, and mason's helpers.

The prospect of good jobs motivates these learners, and their retention in the learning program is high, according to outside evaluators.

educational software programs have pre- and post-tests so learners and their instructors can tell how they are doing. Yet learners' scores, and even the level at which they are working, are kept private from other classmates.

Long-distance learning—via cable TV, computer networks, or other technologies—can increase the richness and diversity of learning opportunities for your members. Learners can access courses from local colleges on TV sets, or use the Internet to search out information on subjects of interest. Classrooms and teachers at different locations can be connected by video transmission equipment that allows two-way communication. Communications technologies are also being used to link some multi-site learning programs. The Communications Workers, among others, have been exploring the potential of the Internet for distance learning.

Classroom technologies can be a draw for workers who are curious about the high-tech equipment. Some may feel threatened by new technologies at work, and getting familiar with computers in a friendly setting can take the edge off their anxiety. It's also easier for adults to tell people they are studying computers than to acknowledge difficulties with reading or math—so computer-assisted basic skills instruction is popular.

If you use learning technologies, though, don't let learners become isolated from each other at their computers or TVs. Build in time for class discussions so your members can enjoy the important benefits of learning as part of a supportive group.

Choose Software That's Right for Your Members

The first thing to do before selecting any learning technology is to clearly define your program's educational goals. Then explore the learning systems that can take you to those goals.

If you are considering computer-assisted instruction, choose the software first and the hardware to run it second. Your teachers and learners should take part in selecting educational software that will meet their educational goals.

And finally, you should provide training for your teachers to ensure that they get full use out of the products.

Despite its many attractions, computer-assisted instruction isn't always advisable. A lot of the commercially available basic skills software is aimed at youngsters and isn't suitable for adults. Moreover, it's hard to find software where basic skills are presented in a context that's appropriate for working adults. Also, software and the equipment to run it can be expensive.

Before you buy anything, try to observe the same products or system in use, and insist on a trial period before buying. We urge you to consult with other labor organizations on their experiences with specific software and hardware.

If you can afford a substantial investment for customized software, your union can actually design its own instructional software for the computer. The use of so-called "authoring" programs simplifies the writing of instructional software. You may want to explore the possibilities of customized software as lower-cost authoring programs become more widely available.

Create a Supportive Learning Environment

In the worker-centered classroom, learning takes place in a way that preserves the worker's dignity and sense of self-worth. This may seem to go without saying, but it is worth reiterating, particularly when so many well-intentioned programs fall short of this goal.

Workers should have positive feelings about their program, confidence about their participation in it, and pride in their accomplishments. This can't happen when they are stigmatized by participating—when they are exposed as "illiterates" or when the threat of firing or demotion hangs over them if they don't learn enough.

Unions have seen their members respond positively to basic skills instruction when the instruction is linked to academic or occupational skills that they can use in their personal lives or jobs. Terms such as "worker education," "skill upgrading," and "certification prep" help workers feel good about learning; "literacy" and "remedial education" don't.

Moreover, the learning environment must be supportive of learners' diversity—including differences in race, ethnicity, gender, or disability. Insensitivity to minority points of view will undermine learning, as will culturally biased course materials and tests. Rather than penalizing some learners because their life experiences have been different from the majority, the program must provide opportunities to bring those varied perspectives into the classroom so that everyone can learn from them.

When learners have an opportunity to help plan the program and contribute their points of view, the risk of inadvertently alienating them is considerably reduced.

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STEP 8 Encourage Your Members to Participate

A union, as a democratic institution, strives to advance the interests of all its members equally. The same must be true for your program. Make the program fully accessible to your members, and try to ensure that participation is voluntary. Confidentiality of classroom records is essential so your members can feel comfortable about enrolling. Outreach and counseling by union staff will help workers get the most they can from the program.

Ensure Access to the Program

As a union leader, you can work to ensure that your members have full and fair access to workplace-based education and training programs. You can see to it that eligibility doesn't favor people who work certain jobs or shifts. The program can't be limited, even inadvertently, to workers of a certain sex, race, or age. It can't exclude workers with disabilities. Instead, every worker who has an interest in learning should be encouraged to attend. The principle of equal access to learning needs to be a tenet of your program. This means ensuring equal opportunity not only for the learning program itself, but also for any job advancement opportunities that may result.

You can actively help your members overcome fears that may keep them from participating. Many adults are apprehensive about failure in the classroom, and that anxiety is magnified in situations in which they feel their jobs are on the line. Adults can also feel ashamed or embarrassed to admit they need help. Through union counselors or stewards, you can take the stigma out of learning and help members understand that learning is a normal, even exciting, part of life. Members who have already used the program make excellent advocates (see the box on "Learning Advocates Get the Word Out" later in this step).

Effective use of supportive services (as discussed in Step 2, "Identify Your Members' Needs and Goals") can also reduce potential barriers to participation.

Give Workers the Choice to Participate

Participation in your education program should be voluntary; it should also be a private decision.

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Ways of Making the Program Accessible

These approaches can help you ensure that the doors to your program are open to as many of your members as possible.

- Give information about the program to all segments of your membership. Show them how the program can serve their needs. Specially targeted recruitment can help you attract a cross-section of your membership.
- Create a learning environment that reflects the needs, interests, and skill levels of workers from all segments of the workforce. Whenever feasible, offer instruction at beginning, intermediate, and advanced levels. This prevents "creaming" (helping only those with the best skills), yet recognizes the needs of workers at various skill levels.
- Develop a timetable for enrollment and use waiting lists if necessary, so everyone who wants to participate can be included in the program.
- Incorporate other union benefits into the program to support participation. For example, union-sponsored social services may make it possible for some members to attend the program.
- Hold classes in convenient locations. Many unions establish a single learning center at the union hall or other nearby site. If your membership is scattered, you may have to use several locations, such as schools, libraries, or churches that are near workers' jobs or homes. Access to public transportation is usually important, and you need to tailor classroom hours to workers' schedules.
- Make sure class facilities are accessible to workers with disabilities. Sign interpreters are provided by some union programs as needed.
- Help parents make child care arrangements. Some union-operated programs help parents obtain child care services from qualified community organizations. Others provide a child care stipend so workers can make their own arrangements.
- Minimize the cost to participants. Don't pass operating costs through to the learners, and keep the cost of books and materials to a minimum.
- Train union members as mentors or peer counselors. They can help reduce the anxiety workers may feel about enrolling, as well as solve attendance or motivational problems.

Compulsory attendance requirements can severely undermine the effectiveness of a workplace learning program. Learning is not like a chemical reaction that ignites automatically when you assemble the right ingredients. People must *choose* to learn. That's because learning requires individuals to exert an active effort. Learning stands little chance in a "shotgun" program where workers are told to participate or lose their jobs.

Rather than requiring attendance, you should create positive incentives for

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Release Time Versus After-Hours Classes

As an incentive to participate in workplace basic skills programs, some unions arrange for employers to offer release time from work, often with pay, so workers can attend classes on company time. Many unions see this as an advantage for workers who have limited free time after hours. It also seems an appropriate expression of an employer's responsibility for staff training and development. If managers and corporate executives get release time for their training and continuing education, why shouldn't other employees get it as well?

Yet other unions express concern that a release-time program can sacrifice learners' privacy, since their employer usually requires an attendance report. These unions feel the loss of privacy outweighs any advantages of paid learning time. Therefore, they prefer holding classes after hours. Similarly, some unions fear that workers' broader educational interests are shortchanged in favor of job-specific training when the class is on company time.

A third approach is a training bonus, paid by the employer when a worker completes the program. This approach gives workers a choice: tell the employer they are enrolling so they can receive the bonus, or attend without telling the employer and forego the financial incentive but maintain their privacy.

workers to enter the program, and remove potential obstacles as well.

Know the Law About Mandatory Programs

In some cases, workers are protected by law against mandatory requirements for participation in workplace education programs. If you have an employer who is unwilling to accept voluntary enrollment, your union may wish to obtain legal advice on those protections.

When an employer makes performance in a learning program a precondition for hiring, promotion, job retention, or demotion, then Title VII of the Civil Rights Act of 1964 applies. So does the Americans with Disabilities Act (ADA). The requirement to participate in the program must be scrutinized for any discriminatory effects. It must have no adverse impact on any group protected by Title VII (race, sex, national origin, or religion) or ADA (people with disabilities). If it does, the employer must show that its policy meets the criteria for job-relatedness and business necessity (as discussed in Step 2, "Identify Your Members' Needs and Goals," under the heading "Understand Legal Issues on Testing").

Employers are also prevented from setting unreasonable educational requirements for jobs. Court decisions require that educational criteria be job-related. For example, a high school graduation requirement has been ruled illegal for production, maintenance, and apprentice positions when the requirement has a discriminatory effect

on groups protected by Title VII, according to a 1988 review of legal issues by the Business Council for Effective Literacy (BCEL) and the American Bar Association Literacy Task Force.

Mandatory after-hours participation in an education or training program may fall under the overtime pay provisions of the Fair Labor Standards Act (FLSA). If the employer is covered by FLSA, and if the workers meet the legal definition of a non-exempt employee, then the employer must observe FLSA requirements for minimum wage and maximum hours of work, according to the BCEL. State and local wage and hour laws may also apply.

Employers don't have to pay workers while they participate in an education program if the program meets four conditions set by the U.S. Department of Labor Wage and Hour Division, according to the BCEL and ABA. These are the four conditions:

1. The program is held outside of regular working hours.
2. The program is not directly related to the worker's existing job (for example, the program may prepare the worker for advancement to a different job).
3. The employee performs no productive work while attending.
4. Attendance is voluntary and the employee does not think that non-participation would hurt his or her employment or advancement potential.

"Attendance is not considered voluntary if the employee is 'given to understand or led to believe' that his or her present

Preparing Welfare Recipients for Union Jobs

Basic skills education is a vehicle unions can use to reach out to men and women who are entering the workforce from the welfare rolls.

One union experienced in this is the Philadelphia Hospital and Health Care Workers, District 1199C, an affiliate of the American Federation of State, County and Municipal Employees. Since welfare reform was enacted, the union has worked with the state welfare department to help welfare recipients qualify for jobs as certified nursing assistants. But the union's Training & Upgrading Fund has been providing basic skills education to disadvantaged Philadelphia residents since the 1970s. For many years, the Fund has used foundation grants and public job training money to prepare welfare recipients for entry positions, while experienced 1199C members received upgrade training with negotiated training funds. Recently, as changes in the health care industry began to limit members' upgrading opportunities, District 1199C has focused on preparing welfare recipients and its own members for emerging health care jobs in non-hospital settings.

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Protecting Learners' Privacy

Your union can work actively to ensure confidentiality for anyone who chooses to participate in a basic skills program. Elements for protecting privacy are suggested below and should be agreed upon before the program begins.

- Personnel decisions will be based on job performance only and will be consistent with the collective bargaining agreement. This includes decisions on job assignments, pay increases, promotions, and job security.
- Test scores and classroom performance will not enter into personnel decisions. That information will be used only within the program.
- Training records and test results will be maintained by the program. They will not go into workers' personnel files.
- Learners will have complete access to their learning records. Test scores and other performance ratings will be explained clearly to them by teachers, counselors, or other program staff.

working conditions or continued employment would be adversely affected," the BCEL and ABA explained.

Employers *do* have to pay workers when attendance is required. However, FLSA (as amended in 1989) does not require overtime pay under some circumstances. Straight-time pay is allowed for up to 10 hours of class beyond the 40-hour work-week when *all* these conditions are met:

1. Attendance in the class is required.
2. The class offers basic skills education for workers who lack a high school diploma or are performing at an eighth grade level or less.
3. The class doesn't include job-specific training.

Overtime pay is required under *either* of these conditions:

- A required basic skills class adds more than 10 hours to the 40-hour work-week.
- The class includes job-specific training.

Keep Classroom Records Confidential

Individuals must feel assured that their classroom performance will be kept confidential. In most situations, neither management nor the union should have access to information about classroom performance or test scores. Program records should be off-limits for supervisors, managers, and other workers.

Decide where classroom records will be kept, how they'll be stored, and who will have access to them. Also, establish lines of separation between classroom records and the learners' personnel files.

Maintaining confidentiality is in the best interests of both the learners and the employer. As the Business Council for Effective Literacy pointed out in its basic skills guidebook, confidentiality in recordkeeping is essential to establish the trust that a program needs to achieve its best results. Conversely, a lack of trust hampers learning. Workers cannot speak and question freely when they believe their classroom comments could get back to their supervisors, or when they fear a poor test score will find its way into their personnel file.

Publicize the Program to Your Members

Use the union structure to publicize the program and let workers know how it can benefit them, so they'll want to attend. Once they've enrolled, union staff can serve as counselors and troubleshooters to help them stick with the program.

While low participation and high dropout rates have troubled many adult learning programs, union-involved programs often avoid these problems because good communication is maintained between unions and their members. That communication is part of the reason many union-run programs have waiting lists. It also explains why unions generally assume responsibility for recruitment in programs jointly operated by labor and management.

A key part of recruitment is explaining the purpose of the program and educating your members about how it will help them accomplish their own goals. Clearly explain the program's agreed-upon goals or mission statement to workers (see Step 6, "Outline a Plan of Services").

When you recruit for your program, you can bring to bear all the communication methods that you use in your usual union work:

Learning Advocates Get the Word Out

Workers who have taken classes themselves are the best recruiters, many unions find. Their enthusiasm for learning sparks interest in other workers, and they can be persuasive in talking about the reasons to participate.

Experienced learners often serve as an informal support system for the newcomers. They offer encouragement, give advice on classes, answer questions about assignments, and help other workers figure out how to find time to study.

To build on workers' natural inclination to help other members of their union, unions like the Steelworkers, Service Employees, and others encourage experienced learners to serve as *learning advocates*. Lee Schore and other labor educators have trained volunteers to be highly effective in recruiting and providing peer support. Shop stewards and other members with good "people skills" can make excellent learning advocates.

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Downtime As Learning Time

Auto Workers in Newark, Delaware, were laid off in 1996 for several months while Chrysler retooled the Newark Assembly Plant. Though they drew a combination of Supplemental Unemployment Benefits and unemployment insurance during that period, they were left with a lot of downtime.

Many of them saw this time as an opportunity to improve their knowledge and skills at the regional UAW-Chrysler Training Center. The Center responded with programs that ran the gamut from new trade skills to computer literacy. Through the Center's long-distance learning courses, UAW members could also pursue continuing education and degree programs with local colleges. Plant management separately provided retraining in the skills they would need when they went back to work at the retooled plant.

- announcements by shop stewards
- open house events at the learning center
- word of mouth from co-workers and union leadership
- member-to-member invitations to visit the program
- flyers posted in the workplace
- brochures and letters mailed to homes
- notices in the union newspaper
- door-to-door housecalls
- presentations at union meetings
- seminars or "rap sessions" with workers

Shop stewards can also play a critical role of counseling, supporting, and encouraging workers after they are enrolled in the program. They may be able to identify and solve problems so workers don't get discouraged and drop out. Often, unions provide stewards or other union representatives with special training as mentors, peer counselors, or learning advocates so they can perform these supportive roles (see the box, "Learning Advocates Get the Word Out").

To encourage participation by all segments of your membership, your union may decide to mount special outreach activities that are targeted to those who might otherwise hesitate to enter the program. Certainly effective outreach can also be important in overcoming any stigma workers may feel about entering an education program.

Provide Channels for Learners' Concerns

The fact that your members will have a voice in operating this program sets the program apart from others and helps reduce the anxiety of going back to school. With the union as its sponsor, your program can offer avenues for learner input that aren't widely available elsewhere. When your members are aware of these opportunities, your recruitment efforts may be made much easier.

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Targeting Eligibility for Services

Different approaches for determining whom to serve are illustrated by several unions that participated in the New York-based Consortium for Worker Education at the time of an evaluation study in the 1980s. In its Worker-Family Education Program, the International Ladies' Garment Workers Union (now part of UNITE) established preference for laid-off members for classes related to specific job skills, according to evaluators at the City University of New York. The Service Employees International Union, Local 144, targeted workers who were employed at least 21 hours a week for its nurse's aide upgrading program.

Some unions limited participation to their members, while others opened classes to unrepresented workers as well. In the Local 144 program, learners had to have been SEIU members for at least a year. The Amalgamated Clothing and Textile Workers Union (now also merged in UNITE) was in the enviable position of being able to add extra courses when it was swamped with too many applicants for its Worker Education Program.

You'll want to be sure you've established channels through which learners can voice their needs, their concerns, and their opinions about the program. For complaints that may arise, your union's established procedures for problem-resolution may be appropriate.

Balance Your Members' Competing Needs

You and your union need to be prepared to deal with the potentially divisive problem of competing needs. Your program simply may not have the resources to serve everyone who asks for help.

When that's the case, you may wish to develop a rationale for targeting the resources you do have. This can necessitate tough decisions to narrow the number of people who can initially participate and to focus the scope of the program. Then you will be able to use your limited funds to provide the most effective services for those particular needs.

For example, you may have to choose between non-readers and non-English-speakers. A small program may not be able to provide enough teachers, classroom space, and curriculum materials for both groups. Or you may have to choose between non-readers and low-level readers who don't meet new job requirements.

You may face other kinds of competing needs as well: workers who have outmoded skills and whose jobs are in jeopardy; workers who have actually lost their jobs because of workplace changes; or workers who are still employed and seek advancement to more skilled positions.

If your union represents workers from more than one occupation, plant, or industry, you will have to balance their different needs. If it's a multi-union program, you will want to consider the needs of each constituency.

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Naturally, these choices can be divisive if they're not handled sensitively. The learning program can be a route to higher-paid job classifications and greater job security. Workers who participate may also broaden their opportunities for jobs with other employers, either within the same industry or in new fields. Competition for limited slots can therefore be heated.

Your traditional seniority system is one way of determining who gets served first. You may be able to avoid "either/or" choices by developing a timetable and waiting lists. The waiting list shows workers that they will get their turn in time. Keeping in touch with them while they're waiting can reassure them that the union hasn't forgotten them.

You may also find other ways to help the segments of your membership that you cannot initially include in the learning program. Perhaps you can join forces with other program operators in the community and refer members to them for adult basic education, English as a second language classes, or job training. Or you might look for additional funding to expand your program and serve more members.

The difficult decisions on balancing the needs of your membership cannot be made in a vacuum. The goals and mission of the union, present problems and issues of the membership, and changes taking place in the workplace are just some of the factors which you need to consider when making choices. Explain these decisions clearly to your members.

Reaching Out to Unrepresented Immigrants

In El Paso, where 75% of the workforce is Latino, the Rio Grande Workers Alliance has teamed up with AFL-CIO Union Privilege to educate recent immigrants on the English language, citizenship, and the benefits of union membership.

The Alliance—a program of the El Paso Central Labor Union—serves both union members and those who have no union in their workplace. Unrepresented workers are able to become associate members of the AFL-CIO through the Alliance.

As associate members, the unrepresented workers get to participate in the popular ESL (English as a second language) classes sponsored by the Alliance. Moreover, they are entitled to a wide array of benefits that Union Privilege has developed for associate members, such as legal aid, dental benefits, and income tax services.

Much of the area's job growth has been in service and retail establishments where the better-paid jobs often require English. ESL classes enable workers to develop those language skills. Unions seeking to expand their representation in those sectors, such as the United Food and Commercial Workers, have turned to the Alliance to help them demonstrate the many reasons for belonging to a union.

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STEP 9 Keep Your Program on Track

Once your workplace education or training program is underway, use your union organization to monitor it and keep it in line with your members' learning needs. You'll want to establish evaluation criteria so you can tell if the program is helping your members as it should. Testing is only one way of evaluating progress, and it's important to involve learners in making assessments a constructive part of their learning process. When you spot new needs or weaknesses, institute changes.

Monitor What's Going On

Your union's leadership will certainly want to take an active part in monitoring the learning program. This can be done both formally through the program's governing board and informally through the union's own organizational structure. Leaders can keep in touch with the program through discussions with the members who participate, their shop stewards, union representatives at the worksite, and fellow workers—as well as by sitting in on classes. Keeping a sharp eye on operations is important both to keep services on target and to ensure that funds are used responsibly.

As needed, adjust and correct your practices to stay on course toward the objectives that the union stated for the program at the start.

The worker-centered decision-making processes that we discussed in Step 4, "Define Your Union's Role," can help you in your review of program activities. When you get regular feedback from learners, their instructors, their union representatives, and their supervisors, you have an opportunity to find out what works, what doesn't work, and what new needs may arise. You should use that information to adjust the program so it will be fully responsive to the continually changing priorities of the union and its members.

If it's a joint program, the union needs to be actively involved in assessing how well it is meeting its specific, agreed-upon goals. Evaluation methods should be jointly determined so the views of the union and your members will be fully reflected.

Help Learners Assess Their Progress

To give learners regular feedback on their progress, plan for ongoing assessments that involve learners. While keeping individual results confidential,

the combined results will show the union if the program is effective in serving your members and meeting their learning goals.

A worker-centered program seeks to break away from dependence on standardized paper-and-pencil tests. Instead, you'll want to consider other assessment approaches that also help workers learn (as discussed later in this step, under the heading "Make Assessment Part of the Learning Process"). Such assessments are administered in a non-threatening way, with the results kept confidential.

As you decide how you'll handle assessment, you'll want to keep in mind the amount of experience your members have had with testing. Some, like civil service workers, may be accustomed to taking tests. However, those with less experience are likely to be apprehensive, especially when employers may want to use test scores to determine their future job situation.

Be Alert to Concerns about Testing

Testing is a troublesome issue for unions. We want to help learners measure their progress, but most tests aren't completely satisfactory. There are three major reasons for concern: shortcomings in the tests' design, unreliability in the way they're administered, and unfairness or even illegality in the way their scores are used.

Traditionally, adult education programs have relied on standardized achievement tests to place learners and measure their progress. Virtually all of these tests have major shortcomings. Still, many unions use one or another of these standardized tests because they are readily available, inexpensive, relatively easy to administer, and their "nationally normed" scores are accepted by many educators. Many funding agencies require the use of these tests, and learners are likely to need test-taking skills if they go on to further education at a community college or other formal program. Some standardized basic skills tests are designed specifically as before-and-after tests. These pre- and post-tests seem attractive because they appear to produce the kind of information unions want for evaluating their programs.

It's important to recognize the limitations of testing. Moreover, tests provide just one piece of the information your union needs to keep the program on track.

Understand What Tests Can Tell You

Your program's instructors will want to assess learners' skills for several reasons:

- to place workers into the learning activities most appropriate to their needs
- to monitor progress
- to help learners set goals and measure their individual progress
- to evaluate how well the instruction is meeting their needs
- to provide union leadership with information about the program

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The most widely used standardized basic skills tests for adults are used to measure group performance rather than for individual diagnostics. These basic skills tests include:

- ABLE (Adult Basic Learning Examination), published by Harcourt Brace and Company, San Antonio, Texas
- TABE (Test of Adult Basic Education), published by CTB/McGraw-Hill, Monterey, California
- WRAT (Wide Range Achievement Test), published by CTB/McGraw-Hill, Monterey, California

Some of these tests are long and daunting to people who have reading difficulties, although at least one, the TABE, has a short form. Less formal, one-on-one tests are also available, such as:

- SORT (Slosson Oral Reading Test), published by Slosson Educational Publications, East Aurora, New York

The traditional standardized tests measure grade-level performance. However, the grade-level approach is often inappropriate, even useless, for measuring adults' basic skills, as education experts such as Thomas Sticht and Larry Mikulecky have shown. These achievement tests don't really measure how much adults know or how much their skills increase because they ignore how adults use basic skills in actual life situations. They take reading or math out of the context in which adults use them. Grade-level tests also overlook the differences between how youth and adults use their basic skills. The most comprehensive study of adult literacy to date—the National Adult Literacy Survey—abandoned grade-level measures completely (as we discussed in Chapter 3, "Basic Skills in Today's Workplace").

As an alternative to grade-level scores, some standardized tests are scored with numerical ratings and attempt to make test content more relevant to adult life situations. *Criterion-referenced tests* are those that measure mastery of designated skill objectives. For instance, they can assess skills that are used in reading job-related materials or handling personal finances. Some program operators have designed their own criterion-referenced tests to measure how learners meet the program's specific skill objectives. Of course, the skill objectives also need to be designed into the curriculum itself.

These standardized competency-based assessment systems are designed to help manage instruction in job skills and life skills:

- CASAS (Comprehensive Adult Student Assessment System), published by CASAS, a division of the Foundation for Educational Achievement, San Diego, California
- TALS (Test of Applied Literacy Skills), developed by the Educational Testing Service, Princeton, New Jersey
- Work Keys, published by American College Testing, Iowa City, Iowa
- AMES (Adult Measure of Essential Skills), available from Steck-Vaughn, Orlando, Florida

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The CASAS, Work Keys, and AMES tests can be used for individual assessments, while TALS is only used to develop a group profile.

To assess English as a second language (ESL) basic skills, commercially available standardized tests include:

- BEST (Basic English Skills Test), which includes a one-on-one oral assessment and is published by the Center for Applied Linguistics, Washington, D.C.
- CASAS ESL Appraisal, an all-written test published by CASAS in San Diego, as noted above

But standardized competency-based tests aren't always useful either. If they don't test for the skills actually taught by your program, they can't tell you how much anyone learned or how effective the program is. Also, tests' scoring systems may not provide meaningful guidance to instructors in diagnosing individuals' learning needs, which makes it harder for the instructor to design appropriate lessons.

The test most widely used to determine if learners are ready to take the GED exam is:

- Official GED Practice Test, published by the American Council on Education, Washington, D.C.

The instructors who administer standardized tests in your program need to be trained to use and interpret them correctly. Results are skewed if the test isn't administered exactly according to its instructions—for instance, if there are interruptions during the test, different time limits, prior access to questions, and the like.

How the test results are used creates other concerns—particularly if the employer attempts to screen workers for jobs, promotions, or training on the basis of test scores. (See Step 2, "Identify Your Members' Needs and Goals," under the heading "Understand Legal Issues on Testing.") Especially important are the issues of cultural fairness, lack of bias, and the test's reliability and validity in predicting how well workers will do in employment. Workers have some legal protections against non-validated employment tests (as we discussed in Step 2). Because of the complexity of the legal issues related to nondiscrimination in employment testing, your union may wish to get legal advice on the subject.

To decide which tests are best for your program, get advice from educators who understand your program's educational goals, are familiar with the work your members do, and know the features of different standardized tests. You can also consult the manuals put out by the companies that publish the tests, which explain how to use, administer, and score them.

Make Assessment Part of the Learning Process

Since traditional tests can be such unreliable yardsticks for adult learners, many unions use *alternative assessment* methods. These alternative approaches—developed by the programs' teaching staff—may make use of interviews, collections of learners' work,

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observations of how they perform job-related tasks, and other techniques to assess learners' skills.

Because alternative assessment is developed specifically for your program, it can be tailored to the particular goals of your members and to what your instructors actually teach. Learners can be actively involved in the assessment as an interactive process with their instructors: first by saying what they want to get out of the program, then by helping choose the materials they'll study, and finally by telling what they've learned.

Many of the alternative forms of assessment are valuable to learners because they provide continual feedback on their progress. Assessment can be

Assessment Alternatives That Involve the Learners

A variety of assessment techniques can be used instead of standardized tests to place learners into appropriate classes or to assess how much they have learned from the program. These alternatives to standardized assessment must be developed systematically by knowledgeable instructors in order to produce meaningful results.

- ☐ **portfolios of learners' work**

  Portfolios are often used in assessing learners' progress. A portfolio might include samples of the individual's classwork, journals where the learner comments on the classes or other topics, checklists where the learner rates his or her progress, notes from meetings with the instructor, and other materials.

- ☐ **progress assessments**

  Informal tests, developed by the program and given on a regular basis (for example, after each instructional unit). These assist learners and instructors alike to check progress and identify areas needing work.

- ☐ **applied performance measures**

  With this approach, learners perform tasks drawn from their everyday life to demonstrate how they apply basic skills (for example, reading the instructions for a tool from their jobs). These performance-based tests provide a real-life context for assessing learners' progress. Applied performance measures are usually developed by someone experienced in assessment who can tailor them to the specific learning goals of the program.

- ☐ **competency-based tests**

  Some unions, again with the help of testing specialists, have developed tests to show if adults are mastering desired competencies. The tests may be geared to the content of civil service exams, occupational certification tests, high school equivalency exams, or citizenship exams. These tests can rate improvements in workers' technical skills as well as their literacy skills.

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designed to measure learners' progress in achieving performance criteria drawn from their own workplaces. Union members themselves can help develop the performance criteria by serving as the subject matter experts who help identify the skills used in their workplace.

A drawback of these kinds of assessments is that they take time and money to develop, administer, and interpret, and you cannot readily compare results with other programs because they aren't standardized. So some programs use both standardized tests and alternative assessment.

Examples of alternative assessment are found in the previous box, "Assessment Alternatives That Involve the Learners." These alternatives to standardized tests respect the needs of adult learners. They give learners an opportunity to use assessment results as guides in directing their own learning.

Many of the programs using these approaches would subscribe to the credo of the Eastern Michigan University Academy adult learning program: "The celebration of successes is the focus of evaluation."

Help Workers Understand Testing

Workers need to know why tests are given and how their results will be used. Counseling addresses their apprehensions. Instructors or union counselors can help workers understand the testing process and demonstrate how the scores will be used to support the individual's learning plan. They should also explain the confidentiality of test results.

Tests shouldn't generally be given the first time workers come to the program because they can be so intimidating. Schedule them for a later session. By labeling the pre-test a placement test rather than an entrance test, you'll emphasize that no one can fail the exam.

Your union can play an important part in selecting instructors and counselors who are sensitive to concerns many workers have about testing. In programs where some members have been trained as learning advocates (as described in Step 8, "Encourage Your Members to Participate"), the peer counseling they provide can help workers understand how testing will benefit them.

Conduct Evaluation Interviews

In addition to assessing the composite test results to make sure learners are making progress in your program's classes, the union can evaluate the program through its own interviews of learners, project staff, and the learners' supervisors at work. Interviews of learners before and after a class can tell the union what the workers expected from the program and how satisfied they are with what they got. These interviews can shed light on changes in learners' attitudes toward their jobs and their plans for further education or training.

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Interviews with both learners and their supervisors will provide information on changes in the workplace attributable to the program, such as attendance, turnover, advancement, or participation in restructured decision-making systems. Interviews with the project's teachers or counselors can give the union general qualitative information about how well the program achieved its educational objectives.

Information gathered in this way can alert you to outcomes you wouldn't find on a standardized test—changes in workers' self-esteem, their promotion to better jobs, their satisfaction in being able to read to their children, and many others.

Keeping Instruction Up to Date

One practical use of "bottom-up" decision-making is evident in the way the Plumbers and Pipefitters Union designs its apprenticeship math instruction.

To put math skills in a workplace context, the union relies on its locals to tell it how math is currently used on the job. This information comes largely from local apprenticeship instructors, who are in close touch with trainees and familiar with the math requirements for their jobs. As job requirements change, the union updates its math curriculum for apprentices. An annual train-the-trainers conference, begun in the 1950s, creates an opportunity for the union to update its instructors on the new curriculum and teaching techniques.

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6 What To Do If You Don't Operate a Program

If you feel your union is not in a position to operate your own learning program, look at your other options. You can find ways to make education and training more powerful tools for your union even without such a substantial commitment of your union's resources. Here are some activities that give you a chance to develop your union's policies on basic skills education. If you later decide to do more, you'll have a foundation already laid.

Serve Your Members in Other Ways

Some unions may feel it's not feasible to operate a workplace learning program themselves. If that's your case now, you can still make education part of your union's agenda for serving your members.

- ☐ **Assist workers in identifying their own educational goals.**

  Your union can perform an important service to members by raising their awareness of existing learning opportunities in the community and by helping them to set their own goals for further education or training. For example, you can take the lead in helping members identify education that will help them in their jobs and in their personal lives. You can then help them get the services they want from local providers. (See Step 2, "Identify Your Members' Needs and Goals," for more on helping your members assess their education and training goals.)

  Through this review of needs and goals, your union can improve its own understanding of the nature and scope of educational needs among your membership.

- ☐ **Take stock of existing training in the workplace.**

  By taking an inventory of the employer's existing workplace education and training programs, you gain a clearer picture of the opportunities these programs offer your members—and the gaps they leave.

  With this information, you'll be better prepared to help your members fill those training gaps through programs negotiated with the employer. (A guide for conducting an "employer training inventory" appears in Step 2.)

Workers As Education Volunteers

Volunteers from the Allied Education Workers (affiliated with the American Federation of Teachers) and a variety of other unions are tutoring workers at the Union Learning Center established by the Texas AFL-CIO in Austin. The no-cost tutoring services are available to union and non-union workers. The center offers brush-up tutoring in reading and math, plus introductory computer classes. In a program approved by the state education agency and the local community college, the center prepares workers for the GED. Besides the Allied Education Workers, volunteers include members of the Carpenters, AFSCME, Communications Workers, Graphic Communications, and other unions.

A different use for union volunteers was seen in Tennessee, the Volunteer State. The Tennessee AFL-CIO Labor Council trained union members to serve as basic skills recruiters to get fellow members to enroll in adult basic education. The volunteers received training in outreach and counseling.

- **Connect your members with local schools.**

  Your union can serve as a link between workers and the schools, developing referral arrangements with the local adult education program, English as a second language (ESL) classes, technical schools, etc. By moving the union into a more active role in education-related activities in the community, you can broaden your members' access to relevant programs.

- **Alert educators to members' interests and needs.**

  You can increase educators' awareness of your members' needs by taking full advantage of opportunities to become involved in local educational activities. Serving on the boards of educational agencies and community-based training organizations can help you increase their sensitivity to worker needs. Talk to the American Federation of Teachers local union for more ideas on this.

- **Negotiate special programs with schools and community organizations.**

  For a relatively modest investment, schools or training agencies may be willing to hold special classes for your members. These classes can be on subjects chosen by your members and might be held at the union hall. As appropriate, you can help the educators incorporate relevant materials into these special classes (for instance, materials to prepare workers for a certification exam or to introduce new workplace technology).

- **Help workers follow through on their goals.**

  Your union can play a key role in helping workers stick with their education by setting up counseling services, union mentors, and peer discussion groups.

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- **Organize volunteers to assist one another.**

  Enlist the schools in training union members as literacy volunteers. One role of volunteers can be to counsel their fellow workers on educational opportunities in the community. Union volunteers can also offer tutoring to supplement the education that members receive in class. In recruiting volunteers, you might obtain advice and assistance from one of the experienced adult literacy volunteer organizations in your community, such as those affiliated with Literacy Volunteers of America or Laubach Literacy Action.

- **Establish a support services network.**

  Your members will be freer to pursue their educational choices when they have access to counseling, child care, and other services that support their personal growth and development. Your union can cultivate a network of service providers and assist workers to take advantage of them to support their continuing education. A good resource is the AFL-CIO Community Services representative in your area.

Keep Total Workplace Needs in Mind

In these activities, as with others described in this guide, your union should approach workplace education and training as an integral part of your union's broader agenda. Whether you are taking your first step or preparing to operate a full-scale program, the issues are the same as we discussed in the preceding chapters: To find ways of meeting your members' learning needs in a constantly changing workplace and society.

The union is the worker's best advocate on workplace education and training. By making basic skills education part of a coordinated workplace strategy, you'll enable your members to prepare for their future and turn workplace change to their advantage.

Bringing Classes to the Union

Unions can bring adult education classes to their members, instead of referring workers to existing classes. An example of this was the 1983 basic education program developed by Teamsters Local 743 for workers at Aldens Mail Order Company in Chicago.

When the large mail order facility announced its closing, the Teamsters provided several kinds of readjustment assistance to the affected workers. A number of them needed help with reading, math, and English in order to qualify for new jobs or retraining programs. The Teamsters persuaded the Illinois State Board of Education to hold a class especially for these workers. At the union's request, the schools stationed adult education instructors at union headquarters, three hours a day for a six-week period. The union-based program provided intensive basic skills instruction to 38 workers.

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PART III

Getting More Information

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A Advisers on This Guide

We want to acknowledge a number of people who have helped define unions' special worker-centered perspective on workplace education. These trade unionists and educators brought to the discussion a wide range of experiences with basic skills education. Although the Working for America Institute remains solely responsible for what appears in this guide, we owe these individuals much gratitude.

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B Outside Resources

In this section you will find resources to help meet your members' basic skills needs. These resources can be both sources of information and, in some cases, also sources of potential funding to supplement negotiated education and training funds.

Labor Movement Resources

The education department of your international union is the first place to check if you are considering a workplace education program for your members. The education department may be able to put you in touch with others, either in your union or elsewhere in the labor movement, who are experienced in the kinds of programs you are considering.

We also urge you to contact the unions mentioned in this guide. They are only a few examples of the unions that are engaged in innovative workplace education activities.

Unions are making ever greater use of the Internet to share information about their programs and services. The AFL-CIO Web site is a resource on national labor policies and can also direct you to the sites of other unions. Its address is www.aflcio.org.

The Canadian Labour Congress has its Web site at www.clc-ctc.ca. Its mailing address is 2841 Riverside Drive, Ottawa, Ontario K1V 8X7.

We also invite you to visit our Web site at the AFL-CIO Working for America Institute as we develop more information for you on unions' involvement in worker-centered learning. The address is www.workingforamerica.org.

Outside Funding

Over the years, many unions have received grants from federal, state, or local agencies to finance workplace learning programs. To a more limited degree, they have tapped private foundation funds as well.

Government grants have distinct pro's and con's. Unions often find them valuable to supplement negotiated education funds, or as seed money to get their learning programs started. Some use grants for a special purpose, such as developing specific teaching materials. We caution against relying entirely on government funds, for several reasons.

For one thing, each public agency has its own program objectives, and these may or may not be consistent with yours. Also, grant funding follows the calendar of the funding agency, with specific time

limits after which the money ceases. Furthermore, the availability of funds varies from year to year, subject to changing government priorities and appropriations. In periods of general austerity for government budgets, workplace education is one of many needs competing for scarce funds. The funding is less reliable than what you've negotiated with an employer.

If you decide to seek public funds, keep in mind that every federal, state, or local funding agency has different requirements for reporting, keeping records, and managing grant funds. Investigate these fully and understand your responsibilities and potential liabilities before you accept a grant.

Private foundations may allow you greater flexibility in designing and operating a program than government grants do. The key is finding a foundation with interests that match yours. Here are some questions to help you identify potential funding:

- Which foundations serve your geographic area?
- Have any shown an interest in supporting labor-involved programs?
- Which have made adult literacy, training, or education a funding priority?
- Which are authorized to make grants to labor organizations?

Unions that seek outside grants often create a separate nonprofit education or training organization to receive grant funds and operate programs. Some foundations can only give to 501(c)(3) nonprofits. Unions don't fall into that category, but you can create a nonprofit organization that does. Moreover, recipients of federal funds are often subject to an organization-wide audit, and if you have a separate entity to administer the funds, the union itself doesn't have to go through that routine audit.

In pursuing foundation support, your union might join forces with community-based organizations concerned with adult literacy. The community organization may have better access to funds, while you have access to the potential learners.

State and Local Government Resources

As you know, education is largely a state government responsibility. Adult basic skills education is handled differently from state to state, with varied programs, funding levels, and funding priorities. Many of these state-run programs get their funding from federal appropriations; others, from the state legislature. Your state education agency is responsible for these programs and can tell you about current policies and priorities in your state.

Many states handle workplace education as part of a consolidated workforce development program or economic development program. Whatever the case in your state, you are likely to find a number of useful resources through state and local agencies, as listed below. Your AFL-CIO state and local central bodies can help you contact appropriate officials. The Internet Web site for your state or local

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government may also be a good place to find information on adult education programs in your state and locality.

- **adult basic education**

  For access to existing adult basic education services, talk to the state or local adult education program run through your public school system. Each state education agency administers a variety of programs, including adult basic education and GED classes.

- **state basic skills or literacy programs**

  In addition to the federal funds available to states for adult basic skills education, some states have enacted their own literacy education programs that use state appropriations. Your state or local board of education can give you information about these, including whether unions are eligible to operate funded programs.

- **vocational education programs**

  The state or local board of education may also offer workplace-related basic skills as part of its vocational education program. Your union could explore a relationship with voc ed institutions that have developed this capacity.

- **English literacy programs**

  English as a second language (ESL) may be offered by your public school system as part of its adult education, bilingual education, or vocational education programs. State education agency funds may also be available for ESL. Sometimes these programs are known as ESOL, English for Speakers of Other Languages.

- **job training programs**

  Laid-off members of your union may be able to qualify for basic skills education provided through job training programs administered by state or local government agencies. Your local Job Service or "one-stop" employment center can provide information.

- **community colleges**

  Community colleges often offer both basic education and vocational programs. They usually seek to accommodate adult learners by giving evening classes and structuring programs for part-time students.

- **economic development programs**

  State and local economic development agencies are yet another possible resource. Many of these agencies support basic skills education as part of their strategy for building a competitive workforce and strong economic base.

U.S. Education Department

Federal government resources for workplace education have fluctuated significantly in recent years. Still, the Education Department remains an important resource for adult education generally, including adult basic skills education.

The Education Department's Office for Vocational and Adult Education (OVAE) has primary responsibility for programs

and policies related to adult literacy. It also administers the basic adult education grants to the states. Within OVAE, the Division of Adult Education and Learning puts out fact sheets, maintains a Clearinghouse, and publishes a newsletter.

U.S. Department of Education
Office of Vocational and Adult Education
Division of Adult Education and Learning
600 Independence Avenue, S.W.
Washington, D.C. 20202
Phone: (202) 205-8270
Internet: www.ed.gov/offices/OVAE

National Institute for Literacy

The National Institute for Literacy is an independent federal agency with the mission of increasing adult literacy. NIFL conducts research on adult and workplace basic skills education. Through its LINCS network, it works to spread information and develop communications among people in the field of adult basic skills education. Its clearinghouse is a source of NIFL publications.

National Institute for Literacy
1775 I Street, N.W., Suite 730
Washington, D.C. 20006
Phone: (202) 233-2025
Internet: www.nifl.gov

NIFL Clearinghouse
Phone (tollfree): (877) 433-7827
Internet:
www.ed.gov/pubs/edpubs.html
(go to search and type in NIFL)

NIFL also provides support for the National Adult Literacy and Learning Disabilities Center, a national resource for adults who think they may have a learning disability.

U.S. Department of Labor

The Department of Labor administers federal workforce development grants to the states, and as noted in the section on "State and Local Government Resources," basic skills education is among the possible uses for these training and education funds. Through its work to develop national voluntary skill standards and its support of the O-NET (Occupational Information Network), DOL plays a central role in efforts to identify the basic skills that workers need for particular industries and occupations.

U.S. Department of Labor
Employment and Training Administration
200 Constitution Avenue, N.W.
Washington, D.C. 20210
Phone: (202) 219-5000
Internet: www.doleta.gov

Canada's National Adult Literacy Database

In Canada, the National Adult Literacy Database provides an information network on adult basic skills programs and resources, with links to other services in North America and overseas. Funded by the National Literacy Secretariat, NALD can be reached at:

National Adult Literacy Database, Inc.
Scovil House, 703 Brunswick Street
Fredericton, New Brunswick, E3B 1H8
Phone: (506) 457-6900 or
1-800-720-NALD
Internet: www.nald.ca

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C Useful Reading

AFL-CIO. *Downsizing the American Dream: How Working Americans Feel About the Economy, Living Standards and Corporate Irresponsibility.* A report by the AFL-CIO based on research by Peter D. Hart Research Associates and the Mellman Group. Washington. 1996.

The national survey documents the public's widespread (83%) distrust of corporations as well as its substantial (58%) concern about government's failure to invest adequately in education and training.

AFL-CIO Ad-Hoc Committee on Training. *A Report on National Training Policy to the AFL- CIO Executive Council.* AFL-CIO. Washington. May 1993.

A well-trained, high-performance workforce is America's best advantage over competitors abroad, the report finds. Our country therefore needs to at least match the training investments of our competitors. The private sector has the chief responsibility for training, but government must play a key leadership role. Workers need to have an equal voice with their employers in work-related education and training.

AFL-CIO Committee on the Evolution of Work. *The New American Workplace: A Labor Perspective.* AFL-CIO. Washington. February 1994.

In this policy statement, the AFL-CIO encouraged unions to take an active role in fostering high wage, high skill work systems in which workers utilize a variety of skills, participate in decision-making at all levels of the enterprise, and receive the training they need "to exercise discretion, judgment, and creativity on the job."

AFL-CIO Human Resources Development Institute. "Proceedings of the AFL-CIO Training and Education Conference, Baltimore, Md., December 3-5, 1986." Human Resources Development Institute [now AFL-CIO Working for America Institute]. Washington. 1987.

This publication summarizes the comments of labor educators and trainers from a variety of unions who participated in a conference sponsored by the Institute and the AFL-CIO Education Department.

Alamprese, Judith A. "Strengthening the Knowledge Base in Adult Literacy: The Research Imperative." In Forrest P. Chisman (ed.), *Leadership for Literacy.* Jossey-Bass Publishers. San Francisco. 1990.

Alamprese makes recommendations for a national agenda for research and developmental projects as a means of improving the theory and practice of adult basic education. She discusses the limitations of present grade-level testing tools for measuring adult literacy levels and comments on alternative performance measures such as competency-based assessment systems and applied performance measures.

Alamprese, and Ann Kay. *Literacy on the Cafeteria Line: Evaluation of the Skills Enhancement Training Program.* COSMOS Corporation. [Washington.] 1993.

A partnership led by the Food & Beverage Workers Union and 13 food service companies provided basic skills education to cafeteria workers in Washington, D.C., under a National Workplace Literacy Program grant. This evaluation report describes the workplace-based partnership and the worker-centered educational program it created.

Appelbaum, Eileen, and Rosemary Batt. *The New American Workplace, Transforming Work Systems in the United States.* ILR Press. Ithaca, N.Y. 1994.

Through case studies, Appelbaum and Batt assess patterns of workplace change in the U.S. Looking for evidence of high performance, high wage workplaces, they report that most employers are actually either on a low skill path or are adopting only piecemeal reforms. Moreover, most employers fail to offer the training that workers need to keep their skills continually up to date. Where employers respect unions and involve them in decisions, high performance work systems are more successful.

Askov, Eunice N. *Framework for Developing Skill Standards for Workplace Literacy.* Literacy Leader Fellowship Program Reports. Part I in a series [1994-95]. National Institute for Literacy. Undated.

To improve coordination between adult educators and business and union decision makers who are concerned about basic skills in the workplace, this study looked at how those basic skills are being defined by national skill standards initiatives and the Occupational Information Network (O-NET).

Auerbach, Elsa Roberts, and Nina Wallerstein. *ESL for Action: Problem Posing at Work,* Addison-Wesley Publishing Co. Reading, Mass. 1987.

This is a lesson book for English as a second language for adult workers. It has been used by unions such as UNITE (New York City). It presents learning in the context of problem-solving in the workplace, with a strong emphasis on education for change. The title above is the student book; a teacher's guide is also available.

Bassi, Laurie J., Anne L. Gallagher, and Ed Schroer. *The ASTD Training Data Book.* American Society for Training and Development. Alexandria, Virginia. 1996.

Brought together and analyzed in this book are data from many different national studies of employer-provided training. The book is a comprehensive reference source for statistics on training in the workplace in the 1980s and 1990s.

Baugh, Robert. *Changing Work: A Union Guide to Workplace Change.* AFL-CIO Human Resources Development Institute [now AFL-CIO Working for America Institute]. Washington. 1994.

This book brings together the experiences of many unions that are using workplace change to advance their goals of good jobs and a strong union. It discusses union strategies for participating in decisions on high performance work organization, training, and technology.

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Burt, Miriam. *Workplace ESL Instruction: Interviews from the Field*. Center for Applied Linguistics. Washington. 1997.

Providing a good overview of the state of workplace-based English-as-a-second-language programs, the author presents and analyzes 13 case studies. The book is part of the Center's series on Issues in Workplace and Vocational ESL Instruction, which includes Marilyn K. Gillespie's useful *Learning to Work in a New Land, A Review and Sourcebook for Vocational and Workplace ESL* (1996). Both of these cite unions' role in workplace ESL.

Business Council for Effective Literacy. "Employers and the Law of Literacy." *BCEL Newsletter*. New York. No. 17, October 1988.

This article, prepared with help from the American Bar Association Task Force on Literacy, outlines the criteria for nondiscriminatory testing under Title VII of the Civil Rights Act. It covers the Supreme Court's decisions interpreting Title VII and the federal *Uniform Guidelines on Employee Selection Procedures*—as well as the issues of mandatory participation, enrollment outside of working hours, and pay for training. (BCEL is no longer in operation. The National Institute for Literacy in Washington, D.C., stocks a limited supply of BCEL publications.)

Business Council on Effective Literacy. "Job-Related Basic Skills: A Guide for Planners of Employee Programs." *Bulletin*. New York. Issue No. 2. June 1987.

This guide offers a number of checklists and questions that identify important planning issues in the design of basic skills programs. Though written primarily for a business audience, the BCEL materials show sensitivity to learners' needs. (See previous entry for availability of BCEL publications.)

Canadian Labour Congress. *Getting the Money: What Unions Should Know About Getting the Money for Literacy and Basic Skills Programs*. Ottawa. 1998.

Drawing on Canadian unions' rich experience with worker education, this publication advises on negotiating financial resources for basic skills programs and discusses why unions get involved in these programs.

Carnevale, Anthony Patrick. *America and the New Economy*. American Society for Training and Development and U.S. Department of Labor, Employment and Training Administration. Washington. 1991.

Carnevale argues that this a new economic era, marked by reliance on flexible work teams and information networks. In a pamphlet that accompanied this book, "Train America's Workforce," he wrote that "unions are fast becoming leaders in providing career-related training," and that "training programs jointly administered by unions and management now spend more than $300 million per year and represent the fastest-growing segment in the nation's learning system."

Carnevale, and Leila J. Gainer. *The Learning Enterprise*. American Society for Training and Development and U.S. Department of Labor. Washington. 1989.

This report analyzes what companies are doing to keep workers' skills current. It finds that most corporate training focuses on professional and managerial staff, to the exclusion of hourly workers. The authors

admonish employers to increase their investment in worker education. They also urge employers to take advantage of the knowledge and expertise that nonmanagerial workers can contribute to workplace learning programs.

Carnevale, Gainer, and Ann S. Meltzer. *Workplace Basics: The Skills Employers Want*. American Society for Training and Development and U.S. Department of Labor. Washington. 1988.

Although written from a management perspective, this widely cited research report recognized the importance of worker concurrence in workplace learning programs. *Workplace Basics* describes literacy as an array of different skills. As its title indicates, its step-by-step blueprint for workplace learning programs is primarily oriented to employer needs. However, it stresses that without early involvement of unions and workers, proposed programs are doomed to failure.

Chenven, Laura K., and Cathy M. Hampton. *Portfolio Assessment: Celebrating Achievement in Workplace Education*. Labor Education Achievement Program (LEAP). Maryland State Department of Education, Metropolitan Baltimore Council AFL-CIO Unions, and U.S. Department of Education. Baltimore, Md. [1998.]

A comprehensive guide to portfolio assessment, this manual and its two accompanying videotapes are good reference and training materials for instructors in workplace education programs. The assessment techniques described here support the principles of worker-centered learning and provide workplace educators with alternatives to standardized testing.

Chisman, Forrest P. *Jump Start: The Federal Role in Adult Literacy*. Final Report of the Project on Adult Literacy. Southport Institute for Policy Analysis. Southport, Conn. January 1989.

This report, developed with advice from top experts in the field of adult education, made recommendations on strengthening federal policies and programs for adult literacy. Chisman's findings, including his recommendations on new legislation, were endorsed by the AFL-CIO Executive Council in its *Report to the 1989 AFL-CIO Convention*.

Chisman. *The Missing Link: Workplace Education in Small Business*. Southport Institute for Policy Analysis. Washington. 1992.

Among small businesses, which employ 57% of the U.S. workforce, fewer than 5% offer basic skills education, according to this report, even though small employers believe 30% to 40% of their hourly employees have basic skills problems that hinder job performance. Lack of educational providers was a more frequently cited reason than cost. Chisman urges that federal policy focus on meeting the needs of the 20% to 30% of small businesses that he found interested in offering programs.

City University of New York Graduate School. *Evaluation Report, The Workplace Literacy Program of the Central Labor Council and the Consortium for Worker Education*. Worker Literacy Project. Technical Report #2. New York. Undated.

The strengths that unions bring to adult learning programs are described well in this CUNY report, which assessed several labor-operated programs in New York City carried

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out through the Consortium for Worker Education and the Central Labor Council.

Cohen-Rosenthal, Edward, and Cynthia E. Burton. *Mutual Gains: A Guide to Union- Management Cooperation*. Second edition, revised. ILR Press. Ithaca, N.Y. 1993.

This book explores the nature of labor-management relations from the point of view that the two sides can cooperate without sacrificing their integrity. The authors discuss the dynamics of union-management cooperation, making the point that cooperation flourishes when both the union and management are strong advocates for their respective constituencies.

Commission on Workforce Quality and Labor Market Efficiency. *Investing in People: A Strategy to Address America's Workforce Crisis*. U.S. Department of Labor. Washington. 1989.

One of the four findings of this Department of Labor-appointed commission was the need for "lifetime education and training," with employers bearing responsibility for investing more in their workers' skills. The commission recognizes the "successful collaborations" between unions and management in designing learning programs and urges businesses to seek worker input on training decisions. Three union presidents served on the commission.

Consortium for Worker Education. *Education and Training for the Changing Workplace: A Practical Guide for Managers, Unionists, and Teachers*. New York Area Labor Management Educators Committee. New York. 1995.

This work draws on the experiences of labor-management partnerships in the garment and communications industries, among others, to discuss a model framework for cooperation in bringing about workplace change.

Denison, Edward. *Trends in American Economic Growth*, 1929-82. The Brookings Institution. Washington. 1985.

Denison's research documented the significant role workforce education has played in increasing productivity in this country. His work has been cited in a number of prominent labor force studies.

District 1199C Training and Upgrading Fund (AFSCME). *A Manual for Union-Management Educational Partnerships*. Philadelphia. 1989.

James T. Ryan, director of the local's Training and Upgrading Fund, prepared the manual in response to a growing shortage of skilled health care workers in the Philadelphia area, as well as a need for training to help existing workers meet federally imposed certification requirements for nurse aides in the nursing homes represented by the union. The manual presents arguments that can be used to obtain support for a joint learning program. See also National Union of Hospital and Health Care Employees, below.

Equal Employment Opportunity Commission. *Uniform Guidelines on Employee Selection Procedures*. 1978.

These federal guidelines, adopted by the EEOC, Departments of Labor and Justice, and U.S. Civil Service Commission, outline the legal criteria

for employment-related testing and other employee selection procedures under Title VII of the Civil Rights Act of 1964 and related court decisions such as *Griggs v. Duke Power Co.* and *Albemarle Paper Co. v. Moody*. The guidelines appear in the following volume of federal regulations: 29 C.F.R. 900-1899, revised 1989. The volume can be purchased from the Superintendent of Documents, U.S. Government Printing Office, Washington, D.C. 20402.

Ferman, Louis A., Michele Hoyman, Joel Cutcher-Gershenfeld, and Ernest J. Savoie (eds.). *Joint Training Programs. A Union-Management Approach to Preparing Workers for the Future*. ILR Press. Ithaca, N.Y. 1991.

Among the "participant-driven" joint education and training programs described in this collection of essays are those of CWA, IBEW, and AT&T; UAW-Ford; UAW-GM; AFSCME District Council 37; and a number of others.

Fingeret, Hanna Arlene. *Adult Literacy Education: Current and Future Directions. An Update*. Information Series No. 355. ERIC Clearinghouse on Adult, Career, and Vocational Education. Center on Education and Training for Employment. College of Education. Ohio State University. Columbus. 1991.

Fingeret offers ideas on a framework for thinking about adult literacy issues, including how literacy is defined, who has power in literacy education, and what the purpose of literacy education should be. She suggests moving away from a skills-based model and toward a participatory, meaning-based model of literacy. The participatory model, giving learners power over the meanings of their words, is essential if programs are to achieve social change, she writes.

Fingeret, Arlene, and Paul Jurmo (eds.). *Participatory Literacy Education*. No. 42 of *New Directions for Continuing Education*. Jossey-Bass, Inc. San Francisco. Summer 1989.

This small but useful volume contains chapters on aspects of participatory education, including discussions of how to incorporate a learner-centered approach in program management and assessment. Articles by Jurmo and Rena Soifer are noted separately, below.

Forlizzi, Lori, Priscilla Carman, and Eunice N. Askov. *Project Lifelong Learning for the Workplace*. Package containing "User's Guide" and videotape. Institute for the Study of Adult Literacy, Pennsylvania State University. [Undated.]

This package includes a variety of materials to help plan and implement workplace education programs. A 28 minute videotape documentary shows three workplace education strategies—one of which is the Seafarers International Union education program at Piney Point, Md. Two staff development videos, each 28 minutes, describe workplace education strategies that are learner-centered and geared to the needs of adults.

Freire, Paulo. *The Politics of Education*. Critical Studies in Education. Bergin & Garvey Publishers, Inc. Granby, Mass. 1985.

Freire pointed out that adult learning is too often treated as passive (where learners are "empty vessels" waiting to be filled by educators' knowledge),

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instead of the active process it is. He was an advocate of active learner participation in adult literacy programs. A Brazilian educator and political philosopher, he also served as director of education for the Workers Party in Brazil.

GED Testing Service. *Who Took the GED?* American Council on Education. Washington. [Published annually.]

This statistical report provides a state-by-state profile of how many adults obtain their high school credentials through the GED program each year. The majority of adults tested in recent years have indicated their intention to go on to further education and training.

Geroy, Gary D., and Michael G. Erwin. "Assessing Literacy in the Workplace." *Performance & Instruction*. National Society for Performance and Instruction. Vol. 27, No. 5. May/June 1988.

The authors call attention to problems that arise when programs are developed without worker involvement.

Gowen, Sheryl Greenwood. *The Politics of Workplace Literacy*. Teachers College, Columbia University. New York. 1992.

Through an insightful case study of a workplace literacy program at a southern hospital, Gowen shows that workplace education is unlikely to be a catalyst for social and economic change unless change also comes to the workplace itself. Education holds a key to power in the workplace, she observes, but a hierarchical workplace does not allow front-line workers to use that power. Workers will resist job-related learning if they see its goal is to get them to conform to workplace practices that are not in their interests.

Hemmens, Kathleen C. "Linking Retraining with Job and Income Security: The Packard Electric Experience." In *Successful Training Strategies: Twenty-Six Innovative Corporate Models*. Work in America Institute Publication. Jossey-Bass Publishers. San Francisco. 1988.

The case study by Hemmens described the landmark job security and income security provisions of the IUE-Packard agreement and discussed how retraining programs were jointly developed at their Warren, Ohio, facilities.

Hull, Glynda (ed.). *Changing Work, Changing Workers: Critical Perspectives on Language, Literacy, and Skills*. State University of New York Press. 1997.

The studies in this book examine the expectations placed on workers by their workplaces and workplace education programs. Hull is skillful at illuminating workers' perspectives on these programs and how program effectiveness is affected by such things as narrowly focused training, stressful working conditions, tediously structured jobs, and lack of employment benefits.

Johnston, William B., and Arnold E. Packer. *Workforce 2000: Work and Workers for the 21st Century*. Hudson Institute. Indianapolis. June 1987.

For several years after its publication, this study by the conservative Hudson Institute had a strong impact on national workforce development policies. For that reason you may want to be familiar with the report, even though its findings about labor force needs have been called into question. The study argued that fewer workers have the skills needed to keep the country competitive in the new century. (See Mishel and Teixeira, below, for another view.)

Jurmo, Paul. "The Case for Participatory Literacy Education." In Fingeret and Jurmo (eds.), *Participatory Literacy Education* (cited above).

Jurmo defined four different levels of learner involvement in literacy education and linked effective teaching to high levels of learner participation.

Kaminski, Michelle, Domenick Bertelli, Melissa Moye, and Joel Yudken. *Making Change Happen: Six Cases of Unions and Companies Transforming Their Workplaces*. With analytical framework and conclusions by Brian J. Turner and preface by Ray Marshall. Work and Technology Institute. Washington. 1996.

Case studies by staff of the Work and Technology Institute, a joint labor-management research organization, show how high performance work systems help employers meet their goals of reduced costs, improved quality, and increased flexibility while at the same time union members achieve greater participation, broader skills, and increased job security.

Kirsch, Irwin S., Ann Jungeblut, Lynn Jenkins, and Andrew Kolstad. *Adult Literacy in America: A First Look at the Results of the National Adult Literacy Survey*. Prepared by the Educational Testing Service under contract with the National Center for Education Statistics. Office of Educational Research and Improvement, U.S. Department of Education. Washington. September 1993.

This is a report on the landmark National Adult Literacy Survey (NALS), which produced the most comprehensive data to date on U.S. adult literacy. Using a broad concept of literacy and measuring practical applications of three types of literacy skills (prose, document, and quantitative), the study revealed that about 90 million adults have low or very low literacy proficiencies, making it harder for them to function in society and achieve their life goals.

Kleinfield, N.R. "The Company as Family No More." *New York Times*. New York. March 4, 1996.

As part of a series on "The Downsizing of America," the *Times* reported on its national survey of worker attitudes. Seventy-five percent of those surveyed believed companies to be less loyal to their employees than they were ten years earlier, and more than nine out of ten were eager for education or training to improve their chances of keeping their jobs.

Lerche, Renee S. (ed.) *Effective Adult Literacy Programs: A Practitioner's Guide*. Cambridge Book Co. New York. 1985.

This guide to establishing a basic skills program is based on findings of the National Adult Literacy Project, a research program funded by the U.S. Department of Education. It includes useful general discussions of diagnostic testing, instructional approaches, counseling, program management, and many other topics.

Lunsford, Andrea A., Helene Moglen, and James Slevin (eds.). *The Right to Literacy*. The Modern Language Association of America. New York. 1990.

The Modern Language Association published this collection of essays after its 1988 Right to Literacy Conference. The writings raise questions about many widely held

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assumptions about literacy, pointing to the political nature of literacy and its relationship to issues of gender, race, and class.

Mikulecky, Larry, Jeanne Ehlinger, and Avis L. Meenan. "Training for Job Literacy Demands: What Research Applies to Practice." Institute for the Study of Adult Literacy, Pennsylvania State University. University Park, Pa. [Undated.]

This paper discusses the differences between the ways adults and youth read, and how those differences can be addressed in a workplace literacy program. It also describes how literacy needs are changing in a changing workforce.

Mikulecky, and Paul Lloyd. *The Impact of Workplace Literacy Programs: A New Model for Evaluating the Impact of Workplace Literacy Programs*. Technical Report TR93-2. National Center on Adult Literacy Publications. University of Pennsylvania. Philadelphia. February 1993.

From pilot evaluations of two workplace literacy programs, the authors develop a model for assessing the impact of such programs. They report that gains from these short-term learning programs were most evident in areas directly addressed by instruction. Interviews were more sensitive than written questionnaires in picking up changes. The impact on productivity in the workplace was difficult to measure, due partly to the small number of learners and short time-frame of the evaluation.

Mishel, Lawrence, Jared Bernstein, and John Schmitt. *The State of Working America*. Economic Policy Institute. Washington. [Published biennially.]

This respected report analyzes the economy's impact on working people—their income, employment, taxes, and distribution of wealth. It points out that the effect of current government and business policies, adopted in the name of competitiveness, has been to reduce wages and living standards for most Americans.

Mishel, and Ruy A. Teixeira. *The Myth of the Coming Labor Shortage: Jobs, Skills, and Incomes of America's Workforce 2000*. Economic Policy Institute. Washington. 1991.

This rebuttal to *Workforce 2000* argued that the widely heralded shortage of skilled workers is a myth—because employers generally aren't creating high skilled jobs or work systems. To get the U.S. economy on a high skill path, the authors advocated broad upgrading of worker skills and employer policies that build a high skill, empowered workforce.

National Association of Manufacturers and U.S. Department of Labor. *Work Force Readiness: A Manufacturing Perspective*. Washington. June 1992.

Based on focus groups of company and worker representatives, the NAM concluded that worker education and training can play a key role in keeping manufacturing companies competitive. The AFL-CIO Human Resources Development Institute (predecessor of the Working for America Institute) helped NAM assemble the labor focus groups for this study.

National Center on Adult Literacy. *What Works? Literacy Training in the Workplace*. Videotaped teleconference. University of Pennsylvania. Philadelphia. April 13, 1995.

The UAW-GM Skills Center in Baltimore and the Food and Beverage Workers basic skills program in Washington are two of the case studies featured on this videotape. A panel discusses the case studies and answers viewer questions on issues in planning a workplace education program.

National Center on Education and the Economy. *America's Choice: High Skills or Low Wages!* The Report of the Commission on the Skills of the American Workforce. Rochester, N.Y. June 1990.

American employers must adopt high performance work organizations or watch as our country's prosperity slips away, according to this highly influential report. The choice is between investing in worker skills and high productivity work systems, on the one hand, and accepting a low wage, low skill economy on the other. The commission was co-chaired by two former Secretaries of Labor and included prominent leaders from business, labor, and education.

National Union of Hospital and Health Care Employees (1199, AFSCME). *Education & Training—Building Blocks of the Union*. Philadelphia. [1996.]

This booklet, with a foreword by the union's president, Henry Nicholas, presents a concise analysis of why education is so important for workers today. Its focus is the health care industry, but its arguments about making education a union issue carry over to all of us.

Neuenfeldt, Phil, and Eric Parker. *Wisconsin Regional Training Partnership: Building the Infrastructure for Workplace Change and Skill Development*. Briefing Paper No. 96-01. AFL- CIO Human Resources Development Institute [now AFL-CIO Working for America Institute]. Washington. January 1996.

This paper tells how the Wisconsin AFL-CIO and business community have worked together to revive a faltering economy through workplace education and benchmarking of training to advanced industry practices.

New York State AFL-CIO. Workers—New York's Best Investment: *A Report on the Issue of Private Sector "High Performance Workplaces" in New York State*. Albany, N.Y. [1994.]

The New York State AFL-CIO convened a task force of government, business, education, and labor leaders to examine the state's long-term educational needs, and this report summarizes their findings. When their survey found that most N.Y. employers have no strategic plan for the future, the task force urged state funding to help interested employers and unions establish high performance workplaces.

Organisation for Economic Co-operation and Development and Statistics Canada. *Literacy, Economy and Society*. Organisation for Economic Co-operation and Development, Paris, and Statistics Canada, Ottawa. 1995.

This is the report of the International Adult Literacy Study, a seven-country comparative study of adult literacy. IALS found that in other countries as in the U.S., literacy skill deficits are found not just among marginalized groups but affect large proportions of the entire adult population.

Osterman, Paul. "How Common Is Workplace Transformation and How Can We Explain Who Adopts It? Results from a National Survey." Sloan School, Massachusetts Institute of Technology. January 1993.

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Osterman reports that about 35% of private sector workplaces with 50 or more employees have adopted high performance work practices. Through a survey, he found that these companies used at least two of the four practices that he considers basic to a high performance work system: self-directed teams, job rotation, employee problem-solving groups, and total quality management. High levels of training were associated with many of these companies' new work organizations.

Parker, Mike, and Nancy Jackson. "Training Is Never Neutral." Chapter in Parker and Jane Slaughter (eds.), *Working Smart: A Union Guide to Participation Programs and Reengineering*. A Labor Notes Book. Detroit. 1994.

Training changes workplace relations and power, Parker and Jackson assert, so unions need their own agenda for training. They caution that training by itself does not lead to better jobs. It needs to be accompanied by policies that produce more good jobs and provide workers an opportunity to move from poorer jobs to better ones.

Rhode Island AFL-CIO Dislocated Workers Program. *Unemployed Literacy Project*. Videotape, 15 minutes. Produced by Institute for Labor Studies and Research.

The camera records a discussion by dislocated workers, primarily women, who explain what it means to them to be learning to read and write through this labor-sponsored basic skills program. Their classes focused on learning English and studying for the GED.

Richardson, Charley. "Employee Involvement: Watching Out for the Tricks and Traps." Labor Extension Program, University of Massachusetts/Lowell. Lowell, MA. 1999.

This pamphlet helps unions identify the potential pitfalls of joint decision-making programs with management. It discusses strategies for protecting workers' interests when dealing with management on workplace change.

Roberts, Markley, and Robert Wozniak. *Labor's Key Role in Workplace Training*. AFL-CIO Economic Research Department. Washington. September 1994.

The booklet offers an excellent overview of the education and training programs established by unions in a variety of industries to keep their members' skills competitive and up-to-date.

Rosow, Jerome M., and Robert Zager. *Training—The Competitive Edge: Introducing New Technology into the Workplace*. Work in America Institute Publication. Jossey-Bass Publishers. San Francisco. 1988.

Using case studies, Rosow and Zager show how important it is to provide for continual learning in the workplace. They conclude that union involvement and job security provisions both are valuable assets when companies are dealing with workplace changes. A chapter on "Continuous Learning and Employment Security" examines worker-involved learning programs in the workplace. Another chapter on draws on work by Thomas G. Sticht, an advocate of "functional context" literacy education.

Sarmiento, Anthony R. "Articulation and Measurement of Program Outcomes." *Alternative Designs for Evaluating Workplace Literacy Programs Conference Proceedings and Commissioned Papers*. Research Triangle Institute. Research Triangle Park, N.C. October 1993.

The paper discusses different approaches that have been used for evaluating training and education program outcomes for employed workers and analyzes their implications for evaluations of the U.S. Education Department's National Workplace Literacy Program.

Sarmiento. "Major Changes Coming to Adult Education: A Perspective." Guest Editorial. *KET Adult Learning Quarterly*. Kentucky Educational Television. Lexington, Ky. Fall 1995.

With public resources in short supply and most employers showing little commitment to worker education, this article discusses the need for a more coherent adult education system.

Sarmiento. "Workplace Literacy and Workplace Politics." *WorkAmerica*. National Alliance of Business. Washington. September 1989.

In an article in the NAB newsletter, Sarmiento discussed the dangers of literacy audits and the reasons why workers need to be involved in planning a workplace literacy program.

Sarmiento. "Do Workplace Literacy Programs Promote High Skills or Low Wages? Suggestions for Future Evaluations of Workplace Literacy Programs." *Labor Notes*. National Governors' Association, Training and Employment Program, Center for Policy Research. Washington. No. 64. July 31, 1991.

Workplace literacy programs can support the path to either high skills or low wages. It is important to support programs and policies that help push employer policies toward the high skill option.

Schore, Lee, and Jerry Atkin. *Serving Workers in Transition: A Guide for Peer Support*. AFL- CIO Human Resources Development Institute [now AFL-CIO Working for America Institute]. Washington. 1995.

Although the focus of this guide is on the use of peer support in programs serving laid-off workers, the same principles of peer support and "learning advocates" are often used to encourage participation in other union-sponsored learning programs.

Schore, with Atkin and Edward Taub. *A Union Approach to Workplace Education*. Labor Education and Research Center. University of Oregon. Eugene, Ore. September 1995.

This handbook for unions, funded by the Oregon Economic Development Department, discusses forming a labor-management education committee and its role in planning, implementing, and evaluating a workplace education program.

Secretary's Commission on Achieving Necessary Skills (SCANS). U.S. Department of Labor. Washington, D.C. Four reports: *What Work Requires of Schools*, June 1991. *Skills and Tasks for Jobs*, 1992. *Learning a Living* (also in Spanish), 1992. Teaching the SCANS Competencies, 1993.

The high profile SCANS Commission identified eight foundation skills and competencies required for a high skill, high wage economy. Its reports called on employers to reorient their workforce practices and invest in the

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skills of their employees, and it offered suggestions to schools on helping students develop those foundation skills and competencies. A number of labor representatives served on the Commission and issued their own report.

Service Employees International Union. *Workplace Education from A to Z, A Handbook for SEIU Local Union Leaders.* Washington. 1992.

Drawing on the experience of a number of SEIU local unions, this handbook offers many practical ideas on operating a workplace education program.

Shanker, Albert. "Illiteracy: It's Not All Discouraging Words." *American Teacher.* December 1988-January 1989.

In this article, Shanker explained the importance of workplace-based learning from his perspective as president of the American Federation of Teachers.

Soifer, Rena, Martha E. Irwin, Barbara M. Crumrine, Emo Honzaki, Blair K. Simmons, and Deborah L. Young. *The Complete Theory-to-Practice Handbook of Adult Literacy.* Teachers College, Columbia University. New York and London. 1990.

This valuable reference work presents guidelines for establishing an adult learning program which builds on adults' life experiences and weaves basic reading, listening, speaking, and writing skills into all aspects of instruction. Topics include using computers in a basic skills curriculum, integrating basic skills into GED instruction, selecting and training teachers, and others.

Soifer, Young, and Irwin. "The Academy: A Learner-Centered Workplace Literacy Program." Chapter in Fingeret and Jurmo (eds.), *Participatory Literacy Education* (cited above).

Soifer and her colleagues discuss how learner-centered teaching is used in an industrial setting. They relate what they learned in establishing a workplace learning program in Ypsilanti at the invitation of UAW-Ford.

Sperazi, Laura, and Paul Jurmo. *Team Evaluation: A Guide for Workplace Education Programs.* National Institute for Literacy. Washington. July 1994.

This guide presents suggestions for involving workers and other stakeholders in the evaluation of workplace education programs. Team evaluation is particularly appropriate for programs at high performance workplaces, where workplace decisions are collaborative.

Stein, Sondra Gayle. *Equipped for the Future: A Customer-Driven Vision for Adult Literacy and Lifelong Learning.* National Institute for Literacy. Washington. July 1995.

Adults in literacy programs across the country responded to a survey by the National Institute for Literacy, telling in their own words what they desired to get out of literacy education. This book reports on their often poignant answers and explains how NIFL is using them in measuring progress toward the national goal of universal adult literacy.

Sticht, Thomas G. "Evaluation of Job-Linked Literacy Programs." A discussion paper prepared for Job-Linked Literacy Network. Work in America Institute. April 1992.

Sticht discusses the criteria that can be used to evaluate basic skills programs in the workplace, noting that it is important to have goals clearly defined from the beginning.

Szudy, Elizabeth, and Michele Gonzales Arroyo. *The Right to Understand: Linking Literacy to Health and Safety Training*. Labor Occupational Health Program. University of California at Berkeley. Berkeley. 1994.

An average worker cannot understand 40% of the information on chemical hazards given to them by their employers on material safety data sheets, according to a 1992 report. Szudy and Arroyo developed this manual to help health and safety trainers adapt their training methods to reach people of all reading levels.

Turk, James L. "Literacy: A Labour Perspective." Address to L'Institut de Recherches en Dons et en Affaires Publiques Annual Symposium. September 14, 1989.

In this speech, Turk articulated a labor view of the importance of workplace literacy programs to unions and their members. The Ontario Federation of Labour, where Turk then served as education director, established a large multi-site, bilingual workplace literacy program known as Basic Education for Skills Training (BEST).

Turner, Terilyn C. *Literacy and Machines: An Overview of the Use of Technology in Adult Literacy Programs*. Technical Report 93-3. National Center on Adult Literacy. University of Pennsylvania. Philadelphia. 1993. (ERIC Document Reproduction Service No. ED 356408.)

This report examines the use of technology in adult basic skills programs and suggests ways to incorporate learning technologies into the curriculum. It also discusses how to sort out vendor claims about their products and identify technologies that meet your program's needs.

Twentieth Century Fund, Task Force on Retraining America's Workforce. *No One Left Behind: The Report of the Twentieth Century Fund Task Force on Retraining America's Workforce*. With background paper by Carl Van Horn. Twentieth Century Fund Press. New York. 1996.

The Task Force recommended actions that should be taken to ensure ongoing retraining opportunities for working Americans. Joint union-management skill upgrading programs are cited as an approach that needs to be encouraged more broadly. The two labor members of the Task Force were Jane McDonald Pines of the AFL-CIO Human Resources Development Institute (predecessor to the Working for America Institute) and former Jack Sheinkman, former president of the Amalgamated Clothing and Textile Workers.

United Nurses of America, AFSCME. *Charting the Course: Giving Nursing Education a Union Labor*. A guide for becoming education providers. American Federation of State, County and Municipal Employees. Washington. 1992.

This handbook advises nursing unions that union-provided education can help a local union cope with environmental pressures and internal membership demands. It outlines how to start an education program.

U.S. Congress, Office of Technology Assessment. *Adult Literacy and New Technologies: Tools for a Lifetime*. OTA-SET-550. U.S. Government Printing Office. Washington. July 1993.

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New technology has not only created a demand for new skills in the workplace, but also provides tools for improving adult education. In this report, OTA presented a comprehensive assessment of the needs of adults for the broad skills encompassed in the term "literacy." The report offers advice on using educational technologies in adult basic skills programs. (OTA was dismantled by the 104th Congress in 1995.)

U.S. Department of Education. *Workplace Literacy: Reshaping the American Workforce*. Office of Vocational and Adult Education, Division of Adult Education and Literacy. Washington. May 1992.

This report on the Education Department's National Workplace Literacy Program featured two labor-involved projects as exemplary models. One of these was sponsored by the Wisconsin AFL-CIO; another was jointly sponsored by a Hotel Employees and Restaurant Employees local union and the AFL-CIO Human Resources Development Institute. Labor organizations were reported to be active partners in more than one out of four NWLP projects between 1988 and 1991.

U.S. Department of Labor, Bureau of Labor Statistics. "BLS Reports on the Amount of Employer-Provided Formal Training." News release, tables, and technical note. USDL 96-268. Washington. July 10, 1996.

Private employers provided an average of 10.7 hours of training per employee, of which an average of six minutes was devoted to basic skills, this survey shows. The figures were for a six month period in 1995.

U.S. Departments of Labor and Education. *The Bottom Line: Basic Skills in the Workplace*. Washington. 1988.

This booklet credited unions for their historic commitment to education, but its guidelines on implementing workplace literacy programs made scant reference to the contributions unions can make. *The Bottom Line* received wide attention for its step-by-step guide to "literacy audits," but the process it described put workers in the uncomfortable position of being tested and "observed."

Williams, Lynn R., and Leslie Loble. *Building High-Performance Workplaces: Report of the Training Subcouncil to the Competitiveness Policy Council*. Competitiveness Policy Council. Washington. March 1993.

Williams, then-president of the Steelworkers, chaired the Training Subcouncil of this congressionally created policy council. The Subcouncil expressed doubts about an existing "skills gap," noting that employers have tended to avoid reconfiguring their workplaces along high performance principles. To ensure the future vitality of the economy, however, it advocated that employers increase their investment in training to at least 1.5% of payroll and provide more opportunities for front-line workers to continually enhance their skills.

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"Every recommendation is informed by practical experience and an understanding of content; every approach acknowledges individual as well as cultural and situational or institutional variations; each technique resonates with implications from learning theories and organizational sociology. This is a practical document, as well as a compelling argument for key roles for workers in programs designed to expand their literate behaviors. . . . Every college, company, and community organization in the country should make this volume available if they intend to take seriously their responsibilities for literacy and empowered collaborative learning in the future."

— Shirley Brice Heath
Professor of English and Linguistics Stanford University

"At last, we have a manual that demystifies the issue of literacy in the workplace and provides a detailed plan for workers to design and administer their own programs. While many organizations advocate a worker-centered approach to learning, this union guide is one of the first practical manuals to spell out how this can be achieved. [This] is a guide not just for unions, but also for educators, policymakers, and employers."

— Elaine Bernard
Executive Director, Trade Union Program Harvard University

"This book compiles a vast amount of information in an accessible format through precise, candid writing and thoughtful organization. I like the emphasis on collaboration, since I firmly believe that collaborative learning is valid not only for learners but for teachers as well. . . . I predict it will become a resource of considerable importance."

— Rena Soifer
Founder of The Academy, Eastern Michigan University
Co-author of *The Complete Theory-to-Practice Handbook of Adult Literacy*

"Anthony Sarmiento and Ann Kay have developed an exceptionally well conceived and well-written manual on how to develop worker-centered workplace literacy programs. . . . [Their] process of developing an educational strategy for a worker-centered education program reflects the thoroughness of their understanding of issues and problems workers face in any education program. As a result, this manual will be useful to all educators who are committed to student-centered adult education programs."

— Jeff Zacharakis-Jutz Lindeman Center, Northern Illinois University
Reviewed in *Adult Basic Education*

"[available to anyone with 'hands-on' responsibility for upgrading basic skills in the workforce. . . . If every company in America adopted these ideas, the nation would be taking a first step in coming to grips with some of its most serious problems."

— Forrest P. Chisman
Author, Jump Start: *The Federal Role in Adult Literacy*

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